

EXPERIMENTAL EVALUATIVE INSTRUMENT

BASED ON

STANDARDS FOR SHELTERED WORKSHOPS

RECOMMENDED BY

National Institute on Workshop Standards

Published for testing purposes only

NELLIE ZETTA THOMPSON, Ed.D.
Institute Director

NATIONAL INSTITUTE ON WORKSHOP STANDARDS
1028 CONNECTICUT AVENUE, N. W.
WASHINGTON, D. C.

June 1960

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*This Report has been prepared for experimental purposes
and is not to be regarded as a definitive statement of
standards approved by any of the sponsoring Associations.*

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Sponsored by

National Association of Sheltered Workshops and Homebound Programs

and

National Rehabilitation Association

with the assistance of a grant by

Office of Vocational Rehabilitation, U. S. Department of Health, Education, and Welfare

NATIONAL INSTITUTE ON WORKSHOP STANDARDS
1028 CONNECTICUT AVENUE, N. W.
WASHINGTON, D. C.

Gentlemen:

Letter of Transmittal

Pursuant to the joint resolution and the application of the National Association of Sheltered Workshops and Homebound Programs and the National Rehabilitation Association, as co-sponsors, approved the fifth day of June 1958, when the Executive Committee was established, authorized, empowered, and directed, through its Institute Director, to develop and publish Standards for Classification and Evaluation of Sheltered Workshops, this Report is submitted.

In preparing the Report, the overriding considerations were: the training and educational aspects through the widest possible involvement of workshop personnel; research techniques as a training device and as a sound basis for the development of standards; a national frame of reference and a national viewpoint; the designed gradual implementation through active participation, understanding, and acceptance; and consideration of implications for varied ultimate uses of the standards.

The project was executed through the following grants made by the Office of Vocational Rehabilitation, U. S. Department of Health, Education, and Welfare:

SAV 85-58	June 5, 1958 - May 30, 1959
SAV 10-60	August 17, 1959 - October 31, 1959
SAV 88-59	June 1, 1959 - June 30, 1960.

Respectfully submitted,

Nellie Z. Thompson, Ed.D.
Institute Director

To: Executive Committee
National Institute on Workshop Standards

Washington, D. C.
June 30, 1960

Foreword

This report represents a determined and democratic effort of the nation's sheltered workshops to improve their practice. It is an indication that they earnestly desire to achieve a mature responsibility and a dignified status as rehabilitation facilities. The magnitude of the challenge has unified the workshop movement and stimulated further concerted and continuous effort toward improvement.

Although the content will be of value principally to sheltered workshops, it will also be useful to community social planning councils, to organized labor and industry, and to state, voluntary, or private agencies which purchase sheltered workshop services. It is hoped that the ultimate benefits of the standardization of sheltered workshop practice will accrue to the handicapped individual.

To name all those persons and committees, organizations and agencies, who have so ably and unstintingly in time, effort, and means cooperated to bring to fruition this statement of standards would be impossible within the limited space available. However, every person or group who participated in the various phases of the work will, I trust, see his thinking reflected in the report and feel a sustained sense of gratification. The Executive Committee gratefully acknowledges their helpful assistance.

This publication, as a research-type report of findings from varied data and group procedures, does not necessarily represent an official view of the grantor, either of the co-sponsors, or any participating association, agency, workshop, or individual. It is issued with a view toward its use in further experimental development and with the hope that it will be widely used by individual workshops for self-evaluation and self-improvement.

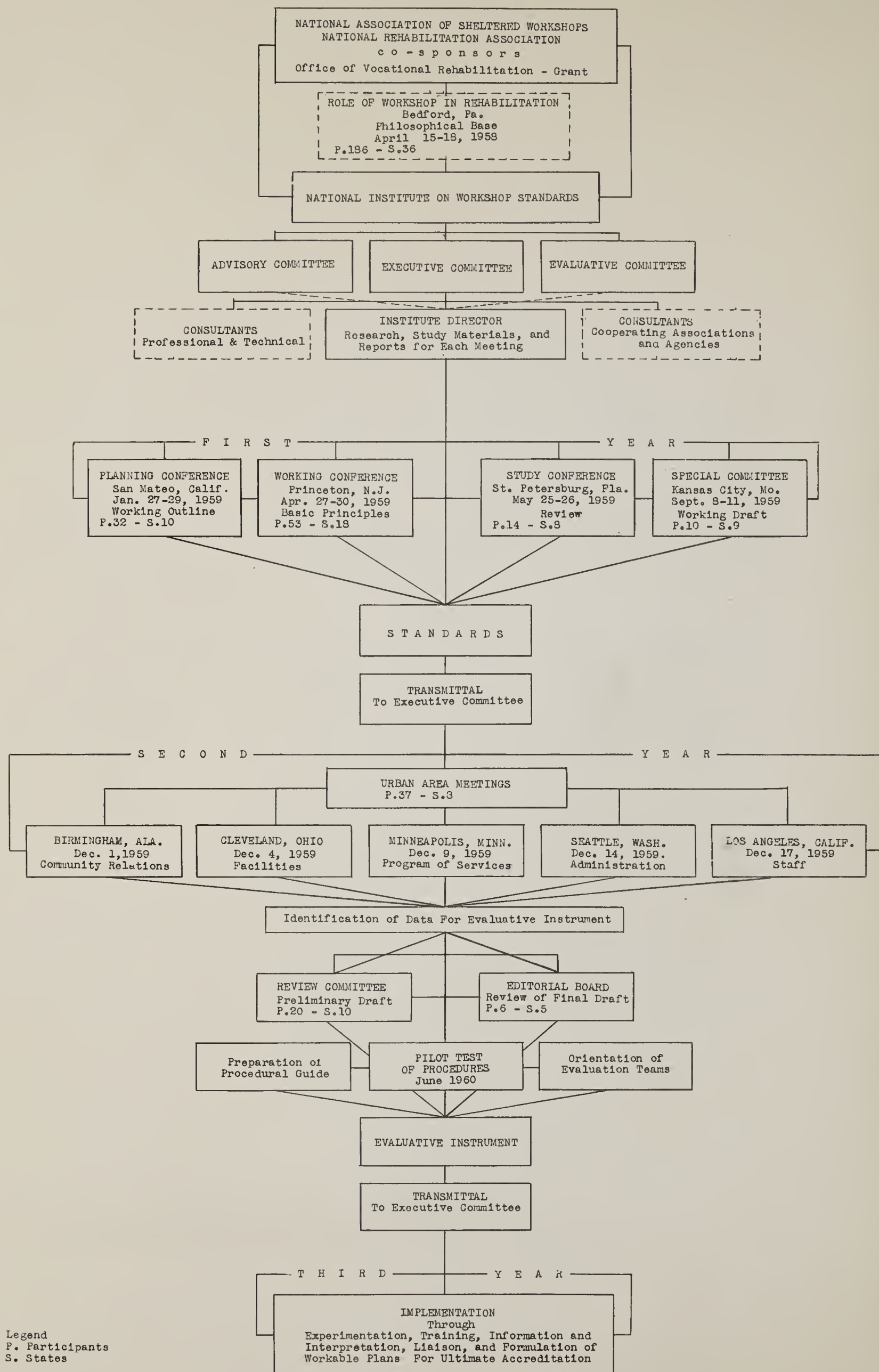
VIVIAN SHEPHERD

Chairman, Executive Committee

National Institute on Workshop Standards

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INTRODUCTION

WORKING CONCEPTS

For working purposes in the development of Standards, the following concepts were derived from a series of conferences and adopted by the Executive Committee of the National Institute on Workshop Standards:

A *sheltered workshop* is a work-oriented rehabilitation facility with controlled working environment and individualized vocational goals, which utilizes work experience and related services for assisting the handicapped person to progress toward normal living and a productive vocational status.

The three major *functions* of sheltered workshops, upon which it is tentatively assumed that classification may be based, are:

- (1) development of employability for placement in competitive employment
- (2) utilization of work for rehabilitation purposes other than employment
- (3) provision of extended remunerative employment in the workshop

The central *objective* of the sheltered workshop is: To assist the vocationally handicapped person to make such basic adjustments to work as will enable him to achieve optimum vocational rehabilitation and economic sufficiency.

A *standard* is a principle or criterion established by general consent, practice, or authority by a given group having a common interest.

Evaluation is the determination of the degree to which the standards are met. An *evaluative instrument* is a tool devised for the purpose of evaluation.

This Report is based on the premise that standards are: (1) an expression of the operating philosophy of the workshop; (2) directly related to the objectives of the workshop in meeting the needs of the handicapped individual; (3) cognizant of pertinent professional standards and official regulations; (4) sufficiently flexible to be applicable to all types of workshops; (5) concerned with dynamic development and acceptability on a national scale; (6) adaptable to technological and socio-economic advances; (7) usable for evaluative purposes only when translated into interpretive detail in the form of an evaluative instrument; and (8) positive approach so as to invite self-examination and self-improvement.

METHODOLOGY

The National Institute on Workshop Standards, in the development of Standards, used principally the combined techniques of structured conferences and select committees, that is, temporary groups of varied size and composition appointed to perform a particular task under planned and dynamic group procedures, to arrive at a consensus of the best judgment of experienced persons in the field of sheltered workshop practice. The series of meetings during a two-year period, September 1, 1958-June 30, 1960, was supplemented by systematic search of the literature, study of related research in progress, mail surveys, consultation, correspondence, interview, and observation.

A total of 264 persons from 30 states participated in the series of meetings and supplementary interviews. Approximately twice that number were extended an opportunity to participate. An additional 436 responses from 50 states were used in various developmental stages. Many who attended meetings or responded to

inquiries involved additional staff members and local colleagues. Continuity from one step to another was assured by the attendance of at least one participant at subsequent meetings and by means of a cumulative mailing list for successive reports. A liaison and information program was maintained with approximately 70 interested professional and trade associations and more than 100 state and local agencies. Contacts were made with industry, labor, and community social planning councils. More than 258 titles of literature, which appeared to be or proved to be pertinent, were examined.

The chronology of the development of standards is shown in the accompanying chart. (*See page 4.*)

RECOMMENDATIONS

It is recommended that the project be extended for a third year for implementation of the Standards through:

- (1) Experimental trial application of the Standards, which may be expected to validate and otherwise refine the instrument, determine the most essential items and establish norms of practice, and yield national data of considerable value.
- (2) Series of Regional Training Institutes to familiarize workshop personnel with the Standards and to assist them in attaining recommended practices.
- (3) Information and interpretation program using regional and national conferences and journals of cooperating associations.
- (4) Liaison with Labor and Industry, and working arrangements with and endorsements or adoptions by interested committees, agencies, councils, affiliations, and associations.
- (5) Formulation of workable plans toward ultimate accreditation.

SELF-EVALUATION PROCEDURE

This Report, with modifications by anticipated experimental usage, is intended to be useful not only for workshops reviewing a well established and comprehensive program but also for those workshops inaugurating new programs or expanding existing programs. Each of the nation's approximately 600 diverse workshops is urged to use this evaluative instrument fully or selectively as a guide to self-evaluation.

The entire sheltered workshop staff, both professional and operational members, should participate in the self-evaluation. It would be advantageous also to involve clients, members of the board of directors, and representatives of referral agencies to a limited extent.

The executive director should have overall direction, supervision, and responsibility for assigning specific duties to individuals or committees charged with conducting particular aspects of the work of evaluating the workshop.

Upon completion of the work of the staff, the workshop should invite an independent team to administer the instrument. The team should be composed of two executive directors of other types of workshops in the region and a liaison person from the State Division of Vocational Rehabilitation or other purchaser of services.

After the team has finished its evaluation of the workshop, the executive director and the team together should study both staff and team evaluations to identify the strengths and weaknesses of the workshop.

The executive director of the workshop should then request the advisory services of a field representative of his parent organization or of a consultant in a particular area of specialization to effectuate self-improvement.

Self-evaluation and self-improvement should become cyclic. The frequency of evaluation should be determined by factors such as the rate of staff turnover, the promptness with which action is taken on recom-

mendations for improvement, advances in related professional and technological fields, the range of areas undertaken in evaluation, the length of time required for evaluation, and cost factors involved in improvement. A comprehensive evaluation should generally be undertaken, except under unusual circumstances, not more than once every five years.

It may be expected that a comprehensive self-evaluation may require from six to twelve months, although the task could be completed in as many weeks. The amount of time will vary with the concentration of effort, the size of staff, the normal workload of staff members, and the degree of committee organization for evaluation.

The team visit may be scheduled for two to five days near the close of the evaluation period. The length of time will be determined by the amount of preliminary preparation made for the team, the thoroughness of its orientation, and the degree of freedom it is accorded for observation.

The purpose of using a team evaluation in conjunction with the staff evaluation is to obtain an objective and unbiased judgment. Therefore, the workshop should make the evaluating team feel free to ask for explanation or elaboration of some items on the checklist, to request factual or statistical information that would aid in interpreting interrelated items, to talk pointedly with clients or board members for obtaining varied points of view, and to observe significant activities which may reveal qualities and intangibles not gained during general observation of the plant.

The materials and records used by the staff in the workshop evaluation, including the standards and codes to which reference is made, should be made easily accessible to the evaluating team upon its arrival at the workshop. Additional information germane to a point that needs further evidence should be made readily available upon request of the team.

All information coming to the attention of a visiting team directly or indirectly, as well as their observations and conclusions, should be regarded as confidential.

Each person involved in the evaluation of the workshop should have a copy of this Report. The workshop being evaluated should have copies of the applicable Codes to which this Report refers.

Scoring should be recorded in the master copy of the executive director. The simple method of scoring each standard and each area of standards requires only a check mark in one of the three columns marked Y (yes), N (no), or A (not applicable), and entry of the total number of check marks in column Y on the dotted lines for each standard. When the affirmative scores of the checklist are plotted on the Profile Sheet, relative weaknesses and strengths of the workshop will be graphically revealed.

Inasmuch as this is an experimental tool, the validity and reliability of the items have yet to be tested and the most essential items and norms have yet to be established. In order that all sheltered workshops may participate in determining the foundational requirements of a good workshop, the cooperation of every workshop is requested in indicating the items considered "not applicable" and those believed to be "most essential", columns marked A and E respectively.

It is anticipated that a proportionate and representative national sample of sheltered workshops will be selected to work with the Institute in making a trial application for further testing and development of the evaluative instrument.

CHECKLIST

A. PROGRAM OF SERVICES

Y N A E

total

1. ***The workshop should recognize and implement the need and right of handicapped persons to work by providing a program of services to prepare them for employment.***

A. Is the philosophy of the workshop expressed in writing?

B. Was the statement of the philosophy of the workshop derived cooperatively by the staff?

C. Has the philosophy of the workshop been reviewed, and possibly revised, during the past three years?

D. Is the philosophy of the workshop in accord with the national trend of rehabilitation thinking at the present time, namely, "If there is a singular role for workshops, it is the planned and purposeful use of work in the comprehensive rehabilitation of the handicapped individual"? (1)

E. Does the workshop have one or more of the following functions: (1) development of employability for placement in competitive employment; (2) utilization of work for rehabilitation purposes other than employment; (3) provision of extended remunerative employment in the workshop?

F. Does the workshop have a clearly written statement of objectives?

G. Are the objectives aligned with the common central objective of workshops of the nation today, that is, to assist the vocationally handicapped person to make such basic adjustments to work as will enable him to achieve optimum vocational rehabilitation and economic sufficiency?

H. Are the staff and board members in harmony with the workshop objectives?

I. Is consideration given to all applicants for workshop service?

J. Do the intake procedures reveal a focus on individual needs?

K. Does the client's route sheet show that his program has been geared to his needs?

L. Is there a close working relationship with other rehabilitation agencies which is indicative of the workshop's recognition that assisting the handicapped person toward normal living augments his reaching a productive vocational status?

M. Does the casework approach indicate concern for the whole and complex problem of the handicapped person as it relates to his employment potential?

N. Is the workshop atmosphere indicative of an awareness of industrial demands upon workers?

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- o. Does the workshop's concept of "employment" embrace both selective placement in competitive work situations and terminal placement in sheltered work conditions?
- p. Is there a follow-through procedure which denotes the realization that the workshop experience may not necessarily be the final service needed by the handicapped person?
- q. Does the executive director have factual data relevant to the needs of the community for workshop services?
- r. Is the staff acquainted with some of the meanings of work in the culture of the present day and with some of the theories advanced for the future?

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- 2. **The services of the workshop should be clearly identified, defined, and directly related to its work-oriented objectives.**
 - A. Are the services of the workshop listed and described in printed form for the use of the staff, counselors, referral agencies, and public?
 - B. Do the services of the workshop translate its objectives into action?
 - C. Is there continuity of services?
 - D. Is there coordination of services?
 - E. Are workshop services flexible in terms of changing needs and scientific advances?
 - F. Are the workshop services related to probable employment opportunities?
 - G. Does employment in the workshop serve a clearly defined rehabilitation value from the time of the client's admission to the time of his case closure?
 - H. Is the range of services actually offered in the workshop clearly distinguished from those obtained or available from other resources?
 - I. Is the workshop staff identified fully in the publication on services in connection with the services for which members are responsible?
 - J. Are personnel of referral agencies utilized by the workshop identified and their qualifications for performing the particular services set forth?
 - K. Does the publication which delineates the services offered by the workshop contain an explanation of the bases for fees charged?

Y N A E

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- 3. **The workshop should not only provide work experience sufficiently diverse to accommodate the needs of its clients but also manifest interest in providing services to the wide range of disabilities existing in the community.**
 - A. Is there sufficiently varied work experience to accommodate a flexible program adjusted to an individual's changing needs?

-
- B. Are there adequately diversified work experiences for clients who have a wide range of abilities within a given disability?
-
- C. Are work experiences differentiated as indicated by the types of disabilities served?
-
- D. Is the degree to which the workshop attempts to develop skills reflected in the kinds of work experience provided?
-
- E. Is work experience available for the development of a broad range of job skills?
-
- F. Has work of varying degrees of complexity, with respect to basic manual dexterity, motion, and movement, been planned?
-
- G. Are several progressive levels of work experience afforded by the workshop?
-
- H. Is long-term work opportunity regarded as a legitimate type of service?
-
- I. Is varied work experience provided for the following purposes: (1) job skills evaluation, (2) job try-out, (3) performance evaluation, (4) on-the-job training, and (5) development of work habits and attitudes?
-
- J. Are requests for training and experience which the workshop cannot fulfill referred to another workshop which specializes in the given area?
-
- K. Are the work experiences provided related to typical potential employment opportunities?
-
- L. Are work experiences in the workshop adjusted in accordance with the shifting labor market of the community?
-
- M. Is diversification increased for workshop clients by occasional mutually beneficial exchanges of clients between workshops of the area for the duration of a certain production contract?
-
- N. Does the workshop utilize the potential inherent in a variety of work situations, such as: (1) manufacturing of new goods, (2) assembling and related services, (3) subcontracting, (4) renovation of used materials, (5) rendering of special and personal services, (6) retail merchandising, and (7) office services?
-
- O. Are the workshop services based on a survey of community needs?
-
- P. Is the executive director aware of the incidence of various types of disability and the number of cases of multiple disability in the community?
-
- Q. Where there is a high frequency of multiple disability or secondary problems in addition to the primary disability classification of the clientele, is provision made to accommodate this need?
-
- R. Are work opportunities available for: (1) the mentally handicapped, (2) the severely disabled, (3) handicapped persons in age range of 50-65, (4) handicapped persons in age range of 65 and over, (5) handicapped women, (6) handicapped young adults?
-
- S. Is a satisfactory balance maintained between the proportion of trainees and sheltered employees to avoid either service being operated to the detriment of the other?

.....

- T. Has the executive director met with other directors of the area or region for any of the following purposes: (1) to establish a joint preliminary intake committee; (2) to determine the need to establish a new workshop; (3) to discuss mutual advantages of combining several small workshops; (4) to consider establishing a regional facility with a workshop unit or residence; (5) to develop programs in line with current trends; (6) to plan a cooperative interpretation program for the public; (7) to study pending legislation and its implications for workshops?

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4. The workshop should coordinate or integrate its services with those of other community agencies for more effective services for the client.

- A. Is there a continuing working relationship with other community agencies in total program planning for handicapped persons?
- B. Has a sound working relationship with state and county agencies been developed?
- C. Have the procedures and organizational structure for coordination of services been committed to informal agreements?
- D. Is the workshop active in community casework councils to promote functionally sound casework on interrelated and interacting problems of the handicapped person?
- E. Is there a definite procedure for the integration of available information about a client from all cooperating community agencies?
- F. Do the case records reveal the specific purposes and services required by referral agencies?
- G. Is the cooperative casework initiated for a given individual continued after his leaving the workshop?
- H. Does the workshop cooperate in the study of both successful and unsuccessful placements as a means of analyzing its program and evaluating its services?
- I. Are there specific channels of liaison and communication among community agencies?
- J. Has scheduling of joint meetings, regular procedures, services, and facilities been cooperatively planned by the agencies involved?
- K. Is there a planned information and orientation program for cooperating agencies?
- L. Has the workshop cooperated in obtaining a community survey which yielded data of value to all community agencies concerned with rehabilitation?
- M. Has the cooperative effort of community agencies resulted in: (1) mutual respect and confidence, (2) commonly understood working language and forms, (3) more accurate screening at intake, (4) more rapid handling of referrals, (5) expansion of available services, (6) increased number of job opportunities and placements, (7) wider acquaintance with regional facilities?

Y N A E

total

5. The admissions criteria of the workshop should be objective and professionally determined.

- A. Does the workshop have a formalized statement of objective criteria for eligibility?
- B. Does the workshop comply with the eligibility requirements and restrictions to which it is subject, e.g., legal basis or affiliated policy?
- C. Is the composition of the intake committee dominantly professional?
- D. Are intake procedures professionally planned?
- E. Are interviews conducted by qualified persons?
- F. Is the information derived from interviews analyzed and interpreted by professionally qualified persons?
- G. Is the formal application supplemented by any necessary professional reports of such nature as: (1) medical, including general health status, work tolerance and capacities, and detailed information on impairments and the resulting limitations; (2) psychological, including interpretation and recommendations based upon interviews, exploration, and tests of intelligence, personality, special aptitudes, interests, and achievement; (3) social, including family and environmental factors in adjustment and recommendations as to readiness and ability to utilize the workshop and supportive services needed to ensure maximum benefits; (4) vocational, including education, training, and work history, and recommendations as to the utilization in the workshop of the skills and aptitudes thus developed?

Y N A E

total

6. The workshop should have a definite procedure for referral to and from community resources.

- A. Does the workshop have, in flexible and index or file jacket form, a descriptive directory of referral resources: (1) in the community, (2) in the immediate area, and (3) in the region?
- B. Does the directory contain a listing of: (1) sources of referral to the workshop; (2) resources for special services for clients referred by the workshop; (3) resources for referral of applicants not eligible or admissible to the workshop?
- C. Is the referral procedure, with any variations required for certain agencies, committed to written form and placed where it is readily accessible to staff members involved?
- D. Are memoranda of telephone conversations and personal interviews, which are part of the referral procedure, recorded and filed?

Y N A E

total

7. The workshop should keep a confidential case record on each client.

- A. Is the case record legible?

Y N A E

total

9. There should be a professional review of each client's progress at specified intervals for the purpose of continuing or modifying his program.

- A. Is the frequency of review keyed to the progressive phases of workshop experience for the client?
- B. Is there a set procedure consonant with the size and type of staff for the progress reviews?
- C. Is the client's progress reviewed by a qualified team?
- D. Have forms been developed by the workshop to facilitate recording information essential to the progress reviews?
- E. Are the case folder and counselor's report used in the review of the client's progress?
- F. Does the review concentrate upon specific information such as (1) shop reports on production, (2) job knowledge and skills, (3) work habits and attitudes, (4) travel training, (5) work tolerance, and (6) personal and social adjustment?
- G. Are both quantitative and qualitative, objective and subjective, evidence studied in the review?
- H. Does the proper staff person or the counselor representing the referral source interpret the progress report to the client and confer with him regarding any desirable change in his program?
- I. Is the vocational plan for the client promptly revised as indicated by the progress review?
- J. Are the following interested persons apprised of modifications in the client's program to be made as a result of the review of progress: (1) client, (2) operating staff, (3) counselor, and (4) liaison person representing referral source?
- K. When the client's progress warrants his advancement from training to actual production, is he correspondingly reimbursed for his productivity?

Y N A E

total

10. Work experience in the workshop should be focused upon the individual's needs and employment goals as indicated by his work evaluation and vocational plan.

- A. Is there on file for every client: (1) an analysis of his needs, (2) a record of his work evaluation, (3) a statement of his employment goal, (4) a written vocational plan, and (5) a periodic review of his progress?
- B. Is the work that the client is doing today specifically designed to further his progress toward employability and placeability?
- C. Has the work in which the client is engaged today been selected with the workshop manager's appreciation of its effect upon his physical and mental condition?

.....

N. Does the workshop make every effort, especially through fully qualified placements, to see that employers have favorable experience in hiring handicapped clients?

.....

O. Are the efforts of those responsible for placement directed not only to management but also to personnel officers, department heads, supervisory personnel, section chiefs, foremen, and related workers in view of prevalent decentralized hiring practices in industry?

Y N A E

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12. The workshop should have a program of follow-up for all clients served and procedures for job adjustment follow-up of each client placed in competitive employment.

.....

A. Does the workshop have a planned program of follow-up for clients to serve the following purposes: (1) to evaluate current status of individual, (2) to determine need for further services, (3) to identify unforeseen problems, and (4) to assist in the analysis and solution of problems arising after placement?

.....

B. Have employers agreed to cooperate with the workshop in carrying out a plan of work for the handicapped person and assisting with his job adjustment in industry?

.....

C. Does a staff member or team work cooperatively with a referral agency in follow-up after job placement?

.....

D. Has the workshop provided for the return of clients who need additional work experience or training after placement?

Y N A E

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13. The workshop should provide work environment and work experience for handicapped persons who require transitional or extended, sheltered and remunerative employment.

.....

A. Is work experience provided for the following purposes: (1) evaluation, (2) diagnosis, (3) therapy, (4) training, or (5) employment?

.....

B. Do the goals of the work experience include: (1) work evaluation, (2) work adjustment, (3) development of work tolerance, (4) prevention of deterioration, (5) acquiring vocational skills, (6) acquiring work habits, (7) acquiring work attitudes, (8) increasing productive efficiency, (9) developing employability, (10) developing placeability, (11) gainful employment on a transitional, recurring, or continuing basis?

.....

C. Are analyses and specifications made available for all workshop jobs so that selectivity may be exercised in assigning the client?

.....

D. Does the program include industrial homework?

.....

E. Are time limits placed on various phases of the workshop program?

Y N A E

total

14. Periodic evaluation of the workshop program should be made as a basis for its improvement.

- A. Does the workshop base its long-range plans upon critical self-examination of its program?
- B. Has the workshop utilized evaluative guides made available by its national affiliate, professional association, or State Division of Vocational Rehabilitation?
- C. Has the workshop made use of evaluation of a particular facet of the program by a team of workshop colleagues, a committee of professional persons, or an industrial engineer within the past three years?
- D. Was evaluation made in terms of the objectives of the workshop?
- E. Does the workshop use such related factual data as the following for periodic evaluation: (1) regular financial reports, (2) payroll figures, (3) volume of sales, (4) number of placements, (5) capital investment, (6) number of clients served?
- F. Has the workshop conducted a study of the following type: (1) of the community concept of the workshop, (2) of the opinion of referral agencies concerning the quality of workshop services, (3) of the attitude of clients toward the workshop, (4) of the amount and nature of publicity the local press has given the workshop, (5) of the impact of workshop publications on readers?
- G. Are follow-up studies used as a basis for program evaluation and improvement?
- H. Is observation of the behavior of clients used as a means of program evaluation?
- I. Can program improvement be related to increase in number of more highly qualified staff?
- J. Can program improvement be traceable to new or remodeled facilities which are more functional?
- K. Can program improvement be identified with more efficient and imaginative administration?
- L. Has program improvement been concomitant with improved interagency and community relations?
- M. Is there continuous evaluation of the workshop program by means of: (1) day-to-day judgments of the training supervisor; (2) regular meetings of key members of the staff to analyze and improve procedures; (3) special committee meetings for the study of workshop problems and evaluation of particular aspects of workshop operations?
- N. Is comprehensive and thorough evaluation made frequently enough to assure continual development and to prevent unnecessary lag between theory and practice, yet at intervals that would minimize disruption to the program?

-
- o. Has the staff worked diligently to improve the quality and uniformity of workshop services?

Y N A E

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total

15. The areas of the program of services should be functional, and the essential elements of each area of service should be directly related to work.

-
- A. Are one or more of the following areas of service provided to facilitate the client's progress toward his employment goal and concomitant normal living: (1) vocational evaluation and diagnosis, (2) orientation and adjustment basic to work, (3) work training and work experience, and (4) selective placement and employment?
-
- B. When a workshop offers a particular area of service, does it have the following essential elements? (*) (See pages 19-25.)
- (1) Vocational Evaluation and Diagnosis
 - (a) Intake
 - (b) Preliminary Assessment
 - (c) Vocational Diagnosis
 - (d) Work Evaluation
 - (e) Prognosis
 - (f) Continuing Evaluation
 - (2) Orientation and Adjustment Basic to Work
 - (a) Interpretation of Client's Physical Condition
 - (b) Conditioning of Client's Personal and Social Behavior Pattern
 - (c) Instruction in Fundamental Areas
 - (d) Orientation to Employment
 - (e) Analysis and Adaptation of Environmental Factors
 - (f) Continuing Observation and Follow-up
 - (g) Counseling and Referral
 - (3) Work Training and Work Experience
 - (a) Job Training
 - (b) Entry (Vestibule) Training
 - (c) Employment Training
 - (d) Vocational (Occupational) Training
 - (e) Trade Training
 - (f) Training in Arts and Crafts
 - (g) Work Experience
 - (4) Selective Placement and Employment
 - (a) Exploration and Development of Job Opportunities
 - (b) Analysis of Job Opportunities
 - (c) Employment Counseling
 - (d) Interpretation to Employer
 - (e) Trial Placement
 - (f) Follow-up
 - (g) Sheltered Workshop Employment
 - (h) Industrial Homework
-
- c. Has the workshop delineated fully whatever areas of service or elements of service it offers?

***Descriptive Definition of Program Elements**

I. VOCATIONAL EVALUATION AND DIAGNOSIS

Intake

Review, coordinate, supplement, and interpret the evaluation studies received from the agency of prior contact, i.e., the referral source, in order to determine the applicant's eligibility and feasibility for the workshop program. In cases of self-referral, arrange for the appropriate preliminary evaluations of the client.

Records are likely to include: (1) medical (general and specialty examinations, treatment, therapy, prosthesis); (2) psychological (intelligence, aptitude, dexterity, and other tests); (3) social (family, community, financial, and environmental factors); (4) educational (academic and vocational training); (5) personal (personal information and personality factors); (6) vocational (specialized training, work history, work attitudes).

Assemble and study the records as they relate to the adjustment and training needs of the client and to the determination and attainment of his employment objective.

Translate the significant aspects of the information into terms meaningful to the client and advise him whether and how the workshop can contribute to his rehabilitation.

Recommend initial tentative programming.

Preliminary Assessment

Obtain or make supplementary assessment to ascertain precise capacities and limitations of the client and to relate these to work experiences selected to facilitate vocational planning progress.

Relate the significance of the following types of information to the planned work experience in setting the program for the client: (1) medical review (to understand general health condition and gross pathology, to provide clearance regarding such problems as cardiac disabilities, tubercular conditions, convulsive disorders, and other problems which may preclude admission or influence training and placement); (2) mental assessment of abstract and concrete intelligence, basic academic skills, visual and auditory memory, autocritical ability, and learning ability (understanding and following instruction, retaining instructions, planning ahead, adjusting to change in work assignments, working with a decreasing amount of supervision); (3) social assessment of general appearance, personal hygiene, social maturity, speech communication, interests, and attitudes; (4) personal assessment of past history as it pertains to adjustment to the workshop situation, of behavior in the workshop as it affects the client's progress and acceptance, and of financial status; (5) emotional assessment including self concept as person and as worker, emotional (impulsiveness, rigidity, anxiety, sensitivity), response to frustration, and psycho-sexual development; (6) physical capacities evaluation.

Physical capacities evaluation has three main aspects. (1) Test, using simulated work equipment, the client's ability to perform the twenty physical activities common to most occupations: balancing, carrying, climbing, crawling, crouching, handling, jumping, kneeling, lifting, pulling, pushing, reaching, reclining, running, sitting, standing, stooping, throwing, turning, walking. (2) Evaluate, during testing, the following factors: qualitative and quantitative achievement in performance of each repetitive test, endurance level and time requirement for each test and the total series, safety factors in performance, attitudes and reactions to testing, general strength and fatigue levels. (3) Assess functional abilities of hearing and seeing which are important to vocational placement and which may affect job performance. Observe visual skills of efficiency, organization, consistency, accuracy, and eye-hand coordination. Disclose problems of fusion, imbalance, depth perception, accommodation fatigue, and color vision.

Vocational Diagnosis

Several steps are involved in vocational diagnosis. (1) Formulate a vocational diagnosis based on the data obtained and derived. (2) Cooperate with counselor and client to develop realistic vocational goals. (3) Outline a tentative program for the client, first ascertaining the precise workshop conditions and opportunities which will make the maximum contribution to the progress of the client. (4) Refer the client to appropriate community resources for medical, casework, or other auxiliary services which would materially and concurrently reduce his vocational handicap.

Work Evaluation

Work sample testing may be described as follows: (1) Administer, in a controlled laboratory or typical job setting, a series of tests of performance on selected work samples from major occupational areas, including technical and sub-professional, clerical (computing, recording, public contact), personal service (domestic and institutional), mechanical and manual (skilled and semi-skilled), elemental work (light, medium, heavy), agricultural and horticultural (farm, ranch, orchard, nursery, greenhouse). (2) Observe, record, and compare score of client with available norms, established by the workshop, in tests covering jobs classified in the *Dictionary of Occupational Titles*, for example, manual dexterity (folding, inspecting, assembling, racking, packaging) and clerical (stapling, stuffing, sorting, counting, filing). (3) Determine, through this systematic sampling of miniature job tasks: physical, mental, and emotional tolerance in work environment; interests, aptitudes, and proclivities; proficiency with tools and machines; necessary job and equipment adaptations; type and degree of personal and social adjustment required. (4) Make recommendations for subsequent evaluation, training, or work experience that are compatible with the client's assets and liabilities for subsequent employment, using, as a basis, criteria including speed of performance, workmanship, method of performance, intellectual functioning, personality behavior, eye-hand coordination, tactile sensation, attention span, interest.

Job exploration and try-outs may be delineated as follows: (1) Assign the client to explore and try-out a structured sample of jobs on a progressive and interrelated basis, for example, bench type assembly or power machine production. (2) Make objective observation of the client in the particular employment field with respect to: interest and aptitude, manual dexterity and manipulative skills (handling, fingering, sensitivity of feeling, coordination, preferred and less capable hand), locomotor ability (general, specific, and combined movements, as well as overall balance and coordination), work habits, work tolerance, use of tools and equipment (ability to identify tools and equipment, ability to use tools and equipment efficiently, judgment in safe use of tools and equipment), quantity and quality of production.

Workshop assessment consists of the following: (1) Place client in a paid, actual work situation in the workshop, such as office services (duplicating, collating, stapling, sorting, addressing), quality inspection (visual or mechanical), woodworking and wood unit assembly, metal working (machine or hand), bench work (wrapping, packaging, assembling—gross or fine), production machine operation and tending, greenhouse operation (potting, thinning, spraying). (2) Observe client's work adjustment with respect to: production (normal and under pressure), accuracy, neatness, responsibility, tolerance frustration threshold, completion of tasks, consistency, working to capacity), increased strength and endurance, range of motion, gross and fine manipulation, interests and attitudes, motivation. (3) Observe client's personal and social adjustment to the work situation with respect to: ability to improve job performance with practice; continuation of interest over an extended period of time; tolerance for routine or monotonous work; attitudes toward, and ability to work with, co-workers; acceptance of supervision and instruction; grooming, appropriateness of attire, care of clothing, etc., contributing to general personal appearance and safety; work habits such as punctuality, responsibility, dependability; reaction to changed work assignments and criticism; identification with group as evidenced in participation and cooperation. (4) Appraise the client's workshop experience as to: readiness for employment setting; realistic level of aspiration; intensity of motivation and sustained drive; ability to understand, retain, and follow directions in safe and systematic manner; work habits and attitudes with respect to changed assignments, supervision, criticism and correction, interpersonal relationships, skills (manual benchwork, hand tool, power tool), tolerance levels (physical, mental, emotional), visual-motor coordination, significance in terms of family acceptance, performance levels.

Prognosis

Review totality of case materials, developed to this point to predict and recommend needs for therapy, adjustment, training, and placement, from a vocational frame of reference; potential adjustment to work environment; feasibility for further training and degree of improvement which can be expected toward realistic employment goal; vocational areas in which client is likely to make optimum development; program of training and/or work experience appropriate for client.

Continuing Evaluation

There are two aspects of continuing evaluation: (1) day-to-day judgments of progress in training, performance levels, and personal and social adjustment; (2) periodic appraisal of client functioning in the employment setting.

II. ORIENTATION AND ADJUSTMENT BASIC TO WORK

Interpretation of Client's Physical Condition

Assist client to make best use of physical self. Motivate client to increase his physical strength, endurance, and manipulative skills, and to guard against mental or physical deterioration. Develop skills or provide techniques for compensating for loss of body member or sensory function. Impress upon the client the importance of weight control and the recognition of symptoms of illness. Aid client to attain improved posture and poise and to eliminate tics and mannerisms. Help with his acceptance and mastery of prosthesis or other mechanical aids for self-care, travel, and work. Aid in his understanding of how and to what extent his handicap may affect specific job assignments and work performance. Relate job's physical demands to work tolerance, and encourage his determination to develop his work tolerance by work hardening and work conditioning processes.

Conditioning of Client's Personal and Social Behavior Pattern

Help the client to understand his psychological problem involved in work. Aid the client to see the significance of personal habits in the work situation. Assist the client to modify socio-cultural attitudes and reactions which preclude his successful work adjustment. Help client to develop a positive self-concept as a person who has personal worth and responsibility, abilities and capacities, a promising and satisfying future. Foster more effective interpersonal relationships arising from the appreciation of the worth of others and respect for the rights of others in the workshop. Provide opportunities for improving basic social skills and etiquette. Provide opportunities for democratic and dynamic group action. Promote satisfying recreational activities typical of the industrial situation. Build security and confidence by meaningful application of and adherence to rules and regulations. Reinforce psycho-sexual distinctions. Reduce emotional stress of time demands, dollar incentives, training activities, group situation, and noise. Instill the concept that handicapped persons can and must participate in their rehabilitation.

Instruction in Fundamental Areas

Instruction under workshop auspices is given in the following areas: personal health and hygiene, personal grooming and care of clothing, social skills and etiquette, ambulation and travel training, use of gadgets for self-care and independent living, use of specially designed tools and adapted equipment, use of safety clothing and equipment, proper use and care of equipment and property, economical use of raw materials, industrial safety and sanitation, manipulative skills and muscular coordination, job application procedures, workers' rights and benefits under state and federal law, workshop policy and practice, first aid, and concepts of time, size, shape, position, direction, monetary value, temporal and spatial relationships.

Orientation to Employment

Provide a real or realistic setting for training and work experience. Provide practical experience in a productive enterprise in which client can compare his performance with the demands of industry. Guide the client toward selecting and reaching vocational goals compatible with his capacities and limitations.

Orient the client to the advantages of job simplification. Introduce the client to assembly line and mass production techniques. Relate remuneration for work to speed and quality. Strengthen the ability to withstand interpersonal tensions. Help client to accept the concept of respect for and subordination to authority in the work situation. Help the client to develop a reasonable degree of independence from authority and direction.

Instil respect for property. Assist client to minimize waste. Increase the attention span of the client. Develop optimum response to production pressure and tension. Develop safety consciousness and habits. Develop good workmanship and pride in accomplishment. Develop work tolerance by progressively demanding work assignments. Help the client to see that routine and monotonous jobs are important and useful in our society. Help the client to feel that there is dignity in even the most menial task in the workaday world.

Develop patterns of responsibility, initiative, and cooperation. Help client acquire and improve skills that will increase his earning power. Help him assume a wage earner's conscientiousness in the use of time. Promote growth of work discipline within the client. Instil acceptable work habits, such as: accuracy, appearance, attendance, concentration, dependability, independence, perseverance, punctuality, self-control, stability, trustworthiness, willingness to learn.

Analysis and Adaptation of Environmental Factors

Identify those environmental factors which affect client's adjustment to work, such as: light, heat, noise, sudden temperature changes, frequent adaptation to darkness or brightness, odors, confusion, isolation, tone of group relationship, quality and type of housing, distance from family, socio-economic status. Effect more favorable conditions under which the client may continue his training and work experience. Enable the client to understand the effect of his socio-cultural background upon his present and future status. Help the client to acquire a feeling of status in his present and prospective work. Utilize and manipulate work environment to enable client to develop acceptable work patterns.

Continuing Observation and Follow-up

Observe client's reactions to setting, co-workers, supervision, and job assignment and analyze their implications for employment. Measure client's progress toward his vocational goal and redefine his goal as indicated. Sustain the adjustment which has been developed and further condition the client to employment as the client moves toward, into, or through vocational experiences in the workshop.

Counseling and Referral

Support the adjustment of the client with a sustained counseling relationship, especially during the initial and final phases of the program. Help the client to understand his vocational needs and the obstacles which he faces in employment. Clarify the relationship of casework and evaluation findings to vocational goals and program planned for client. Coordinate information concerning client for post-workshop planning.

Assist client to understand advisability of visual, auditory, and speech correction, physical therapy, prosthesis, medical treatment, corrective surgery, etc. Assist client to understand himself and modify his self-concept. Assist him to determine realistic vocational objectives and plans, based upon his potentials and limitations. Assist him to understand the workshop experience and its contribution toward his rehabilitation. Assist him to mobilize his resources and to utilize available service in attaining his goal. Aid him in removal of barriers to his optimal adjustment. Interpret social attitudes and behavior as they may affect his employment. Supplement counseling with opportunities for the client to discuss his problems and aspirations more fully and freely with his peers.

Advise client of workshop and community resources. Make referrals for physical restoration and therapy services as needed during the client's changing status. Make referrals for other supportive services which augment adjustment.

III. WORK TRAINING AND WORK EXPERIENCE

Job Training

Job training is work training in a general area in which the client has demonstrated efficiency and employment potential. Job training may be initial training or retraining to enable a client to work the first time, to return to his former job, or to enter a new occupation. The chief purposes of job training are to develop marketable skills and performance standards and to afford opportunities for adjustment basic to work.

Job training is designed to discover and develop abilities, to recover and rebuild work habits, and to provide a proving ground of real work experience for the client.

Entry (Vestibule) Training

Entry or vestibule training is the preparation of a client for competence in a specific production job, ordinarily of semi-skilled class, with a placement already in view, by means of actual work experience in the particular job. In essence, this type of training is a simplified form of vocational training combined with the basic technique of trade training.

It is suitable for both original training and retraining of a handicapped client because of the difficulty of developing a complex of skills in a client without work history or in a client for whom a different vocational pattern has become necessary.

Entry (vestibule) training implies a sustained working relationship with industry and insurance carriers. It also implies coordination with medical and therapy services.

Employment Training

Employment training is characterized by on-the-job training in local business or industry under workshop coordination. It is designed as a transitional stage from sheltered work experience to employment in a competitive situation.

The client is placed in industry to continue with more intensified training, with the understanding that he will be retained as a regular employee as soon as he has become sufficiently adjusted to the situation.

Vocational (Occupational) Training

Vocational or occupational training is based upon an organized course of study and a fairly well established body of methodology. Instruction given in the knowledge and skills essential for performing the tasks required by specific occupations or occupational groups, usually in skilled and semi-skilled classifications.

Vocational (occupational) training in a workshop implies a licensed training facility, formal training procedures, definite curricula, course syllabi, certified instructors, and orientation to education.

Trade Training

Trade training is the preparation of a client for a particular trade by working under an apprenticeship system in that trade. The course of instruction is a planned program of graduated work experience under the tutelage of a master in the trade.

Trade training implies a close working relationship between workshop and trade union or trade association.

Training in Home Management

Training in home management may be geared to personal or social adjustment or it may be a special program for handicapped housewives, designed to release an able-bodied member of the family for employment.

Training in Arts and Crafts

Training in arts and crafts is often a diversional activity, but it may be a legitimate work experience and provide gainful employment and beneficial training for workshops which serve the severely disabled and for temporary periods to maintain skills and adjustment in any workshop.

Work Experience

While work experience in the workshop maintains a close relationship with training and adjustment, striving to match work and worker characteristics, it also assumes an identity of its own as an initial and real employment situation which carries remuneration and is especially valuable to clients without previous work history.

The work experience program is built on a diversified work structure embracing typical areas such as: manufacturing and marketing of articles developed by the workshop, industrial work such as assembly under subcontracts, reclamation of salvage and repair of custom items, operation of a small business enterprise, agricultural and horticultural enterprises, purposeful work activities, and business, personal, and maintenance services.

IV. SELECTIVE PLACEMENT AND EMPLOYMENT

Exploration and Development of Job Opportunities

Exploration and development of job opportunities consists of the following typical activities: extensive job promotion on behalf of handicapped clients; regularly scheduled visits to industry to interest employers in hiring individual clients; use of job order files, employer contacts, and other placement resources; use of community agencies interested in placement of handicapped workers; use of services of the State Division of Vocational Rehabilitation and the State Employment Service; special approaches for hard-to-place individuals or categories; consideration of advisability of encouraging client to relocate to find suitable employment.

Analysis of Job Opportunities

Analysis of job opportunities embraces numerous activities of which the following are typical: Explore fields of work and occupations that seem compatible with client's interests, motivations, abilities, and capacities. Apply test of suitability and availability. Examine preparation for employment objective and prospective job opportunity. Observe workers performing actual jobs under consideration to obtain first-hand knowledge of job demands and requirements. Obtain knowledge of job opportunities including: climate of work situation, emotional strains and stresses inherent in job, personality of employer and supervisory staff, seasonal changes, application procedures required by personnel department. Ascertain information concerning production standards and methods by which such standards have been established.

Utilize working tools such as those of the Selective Placement Branch, U. S. Employment Service, Bureau of Employment Security, U. S. Department of Labor. Study estimates of worker trait requirements for jobs, particularly: level of general educational development normally required of worker; normal or usual time required for specific vocational preparation; level usually required for each of series of specific aptitude factors; particular directions of interest likely to be best satisfied by job; work situations normally most important when judging a person's temperamental fitness for a job; more significant or critical physical requirements and emotional demands and working conditions.

Employment Counseling

The following are aspects of employment counseling: Clarify placement goals, that is, to return to former job if generally suitable and still open, to modify old job to utilize skill and know-how and lost capacity or limited tolerance, or to choose new occupation if client did not have an established occupation or cannot return to former job because of disability or unsuitability. Help client respond positively and aggressively to the selected goal.

Determine which job, occupation, or field of work requires the capacities of the client and in which his limitations are not critical. Plan placement procedures in preparation of application forms and in employment interviews. Assist client to cope with various employer attitudes that may be encountered.

Advise client concerning the organization and relationship of labor and industry. Refer client to appropriate job openings. Encourage client to enter employment that is tolerant to this disability and capitalizes upon his assets. Help client to become stably employed.

Interpretation to Employer

Interpret to prospective employer the capacities and limitations of the client. Explain the advantages and problems involved in employing the client. Recommend in realistic terms the requirements for training, supervision, and adaptation of tools and equipment that are likely to be needed. Improve understanding and attitude of employer toward employment of the handicapped client.

Trial Placement

Arrange for placement on a probationary period during which client is assisted to effect adjustment to the competitive situation. Arrange a temporary appointment to on-the-job experience in industry to motivate desire to work, improve production efficiency, and extend work day gradually.

Follow-up

Establish a continuing contact with the client for a period of follow-up that does not jeopardize the employer-employee relationship. Observe client's progress to insure that a satisfactory vocational, physical, and psycho-social adjustment is made. Check to see that the client has necessary medical supervision and social casework services. Give continued assistance in work adjustment by and for the client. Offer continued counseling and guidance. Ascertain that client is not being exploited. Establish a systematized procedure at specified intervals of time for clients awaiting placement and for those who have been placed.

Sheltered Workshop Employment

Sheltered workshop employment may be characterized thus: (1) continuing paid employment within the workshop for those clients having long-term adjustment problems and severe employment handicaps, for whom more time is required to effect satisfactory adjustment and work proficiency before placement outside the workshop can be made; (2) workshop employment of limited duration and structured goals for those clients ready for placement but for whom job opportunities are not available, in order to sustain client morale, preserve work habits and attitudes, and afford real work experience that will be helpful in subsequent placement efforts in a competitive work situation; (3) employment under controlled and protected conditions for an indefinite period for those clients who have been unable to obtain or retain employment in private enterprise.

Industrial Homework

Industrial homework embodies: extension of workshop services of evaluation and training into the home of the client; personal and social adjustment of the client; utilization of work experience for therapeutic purposes; adaptation of tools and equipment as required; supervision and inspection of operations and products; pick-up and delivery of raw materials and finished products; development of a small business, industry, or service which can be carried on in the home of the homebound client.

B. ADMINISTRATION

Y N A E

total

1. The workshop or its parent organization should be incorporated under the applicable state statute.

- A. Is the workshop chartered as a corporation?
- B. Is the corporation chartered by the state in which it is located?
- C. Does the charter specifically state that the workshop operations may be conducted: (1) intrastate; (2) interstate?
- D. Is the charter granted for an unlimited period of existence?
- E. Under the charter are workshop operations unlimited as to the manufacture or processing of articles or products?
- F. Are the "objects and purposes" fully declared?
- G. Is the corporation permitted by its charter to do any of the following: to receive and accept fees, contributions, gifts, bequests, funds, and/or other monies, real or personal property, stocks, bonds, securities, and other interests; and to invest and/or reinvest, expend, and/or distribute same in the interests of promulgating the objects and purposes of the workshop (corporation)?
- H. Is the corporation permitted and empowered by its charter to do any of the following: lease, acquire, hold, mortgage, convey, and otherwise dispose of all kinds of property, real and personal, in the state of incorporation and/or in all other states?
- I. Does the charter provide for the disposition of assets in a proper manner in the event the corporation is dissolved?
- J. Does the charter make adequate provision for limiting the workshop's corporate membership liability?
- K. Is the workshop a one-unit operation within a parent organization?
- L. Is the parent organization chartered?
- M. Does the parent charter permit the workshop to operate as its authorized agent?
- N. Does the workshop have a copy of the parent charter?
- O. Is the executive director familiar with the contents, permissive clauses, and the limiting clauses of the parent organization's charter?
- P. Is the official name of the corporation stated in the charter?
- Q. Is the location (city and county) of the workshop's principal place of business stated in the charter?
- R. Does the workshop have a printed constitution and a set of by-laws?
- S. Have the articles of incorporation and by-laws been drafted with the assistance and advice of legal counsel?

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T. Has there been a study and/or revision of the constitution and by-laws within the past year?

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U. Are the constitution and by-laws readily available on the premises at all times for reference?

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V. Is the minute book, with other official and valuable records, kept under lock and key or deposited in a suitable safe at night?

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2. The workshop should be operated as a non-profit organization.

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A. Do the articles of incorporation and by-laws clearly indicate that the workshop shall operate not for profit?

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B. Do the articles of incorporation and by-laws limit the purposes of the organization to those set forth in Section 501 (c) (3) of the 1954 Federal Internal Revenue Code?

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C. Has proof of exemption from taxation as a non-profit organization under Section 501 (a), Internal Revenue Code, as defined in Section 501 (c), been established by filing Form 1023 with the District Director of Internal Revenue?

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D. Are all the operations of the workshop strictly in furtherance of the organization's exempt purpose or purposes?

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E. Is the income producing activity of the workshop in fact in furtherance of the exempt purpose of the organization?

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F. Do the regular annual financial records reveal that the workshop operations are conducted on a strictly not-for-profit basis?

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G. Do all state and federal corporation tax reports and returns specifically state that no part of the net earnings of the workshop inure to the benefit of any member of the board of directors or any other individual?

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H. Does the board of directors serve without compensation?

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I. Does the workshop have all the required local permits to engage in business?

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J. Do the articles of incorporation and by-laws comply with state and local tax laws?

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K. Does the workshop finance its capital expenditures from sources other than earned operating income of the workshop?

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L. Does the workshop finance its rehabilitation and service programs primarily through fees and/or subsidy?

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M. Is the workshop carrying out a recognized program of rehabilitation?

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N. Does the CPA annual audit report certify that the operations of the workshop showed a non-profit year?

Y N A E

total

3. The board of directors of the workshop should be a working board.

- A. Do the by-laws establish recognized democratic processes for the nomination and election of members of the board of directors?
- B. Is it the policy of the board of directors that, as far as it may be practicable, its composition shall, at all times be: (1) representative of all those areas of activity in which the workshop is engaged; (2) representative of a cross-section of business, professional, health, management, social service, and labor interests of the community?
- C. Are members of the board of directors nominated and elected on one or more of the following bases: (1) business and professional integrity, (2) demonstrated interest in the work of the workshop, (3) recognized qualifications as advisors in specialized areas of the workshop program, (4) experience in a variety of work backgrounds, (5) educational background in special fields, (6) demonstrated civic responsibility and leadership, (7) outstanding success in specialized areas, (8) ability and willingness to make an important professional contribution to the general welfare of the workshop, (9) close identification with other community and social service activities?
- D. Does the executive director maintain a current biographical file on all board members?
- E. Does the biographical file on board members include information giving: (1) date of election to board of directors, (2) beginning and terminal dates of his term, (3) qualifications, and (4) offices and committee appointments?
- F. Is the size of the board of directors stated in the by-laws?
- G. Can the board of directors work dynamically as a group?
- H. Are the members of the board of directors elected in accordance with the procedures set forth in the by-laws?
- I. Does general policy forbid paid workshop staff personnel to serve on the board of directors?
- J. Do the by-laws clearly establish customary limited terms of service for members of the board of directors and for officers elected by the board?
- K. Does the method of election of the board of directors provide for staggering the terms of service?
- L. Is the method of election of officers of the board of directors stated in the by-laws?
- M. Does the board of directors have the following officers: president, one or more vice presidents, secretary, and treasurer?
- N. Does the charter empower the board of directors to make, amend, and rescind the by-laws of the corporation without the assent of other parties?

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- o. Is the interest of the board members in the work and welfare of the workshop evidenced by their regular attendance at board meetings?
- p. Are disciplinary steps taken against a board member for too frequent absence from board meetings?
- q. Does each board member discharge his specific individual or committee responsibility?
- r. Does the executive director cultivate the interest of prospective board members?

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4. The board of directors should be responsible for establishing the general policy of the workshop.

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- A. Do the by-laws specifically charge the board of directors with the responsibility for establishing the general policy of the workshop?
- B. Does the workshop have a printed statement of policy governing the general operation and conduct of the workshop?
- C. Is the workshop statement of policy available for distribution to interested persons or organizations in the local community?
- D. Is the general policy of the workshop consonant with local and county ordinances and regulations and with state laws?
- E. Does the board of directors have a printed statement covering general policy of the workshop?
- F. Does the general policy of the workshop cover the following areas: (1) fiscal business management, (2) public relations, (3) operations, (4) personnel, (5) plant expansion, (6) rehabilitation services, (7) sales of products and services, and (8) program evaluation?
- G. Do the by-laws provide for a policy committee?
- H. Has a policy committee been established?
- I. Is the policy of the board of directors to require that all persons handling money, or otherwise in positions of special trust, shall be covered under a fidelity bond?
- J. Is the expense of bonding staff members borne by the workshop?
- K. Does the general policy require comprehensive property insurance against loss through fire, storm, vandalism, burglary, and theft?
- L. Does the general policy provide for property protection through employment of night watchman, guard, and/or outside security agency?
- M. Are all established policies in harmony, in spirit and letter, with the workshop constitution and by-laws?

Y N A E

total

5. The board of directors should employ an executive director and delegate to him overall administration of the workshop program, the execution of the policy and directives of the board of directors, and such other duties as are generally associated with his office.

A. Does the delegated authority of the executive director appear in the official minutes of incorporation?

B. Is the executive director, as a paid officer, delegated with authority to operate within, and to carry out, the established general policy of the corporation?

C. Are the minutes of meetings of the board of directors explicit in the delegation of authority to the executive director?

D. Does the executive director discharge his responsibilities as agent of the board of directors in all legal, official, and business matters?

E. Is the executive director authorized to make fiscal expenditures shown in the budget?

F. Does the executive director have authority to determine which members of his staff shall be bonded?

G. Does the executive director constantly examine his administrative policy to determine that it is always in harmony with the general policy?

H. Does the printed statement on administrative policy serve as a staff manual and operational guide?

I. Does the administrative policy provide for regularly scheduled meetings of the staff to arrive at better communication and understanding of policy?

J. Is the administrative policy as it pertains to the clients thoroughly understood by the staff?

K. Does the administrative policy include specific policy on admissions?

L. Does the administrative policy clearly delineate the respective duties and relationships of staff members to clients?

M. Does the administrative policy provide procedure for the challenging of client grievances to the proper staff members for remedial action?

N. Will a random spot-check of sample reports confirm that actual practice is in conformity with applicable administrative policy?

O. Is the administrative policy examined by the board of directors at periodic intervals to determine that it continues to satisfactorily meet the workshop needs?

P. Does the administrative policy include the requirement that periodic operational reports be submitted to the board of directors by the executive director that will clearly show that policy is being fully carried out?

Q. Does client morale and incentive reveal good policy?

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R. Does the executive director have authority to hire employees, or additional employees, from time to time, appropriate to the needs of the agency?

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S. Does the executive director in fact actually enjoy the full measure of administrative authority delegated to him by the board of directors?

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T. Are the administrative duties of the paid executive director clearly defined and outlined at the time of his employment by the board?

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U. Are the duties of the executive director reduced to writing and kept on file?

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V. Are the duties of the executive director revised from time to time, and such revisions made part of the file?

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W. Does the executive director meet with the chairmen of regular and special committees at least once after each meeting in order to coordinate his work with theirs?

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X. Is the executive director an ex-officio member: (1) of the board of directors, (2) of regular (standing) committees, and (3) of special committees?

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Y. Is the authority for ex-officio membership of the executive director contained in the by-laws?

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Z. Does the executive director submit periodic reports of his work and activities to the board of directors?

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AA. Does the executive director enjoy the complete and frank confidence and support of the board of directors?

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BB. Does the executive director maintain an annual calendar of program activities?

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CC. Does the executive director, through appropriate media, interpret the policy of the workshop to: (1) staff, (2) clients, (3) referral agencies, and (4) community?

Y N A E

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6. The executive director should assume leadership in obtaining the necessary facilities and staff to carry out the workshop program.

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A. Does the executive director inform the board of directors of the needs of the workshop and propose a program designed to meet those needs?

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B. Does the executive director prepare and submit to the board an annual budget, with accompanying analysis?

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C. Is the executive director encouraged by the board of directors to develop and submit new ideas for consideration and action?

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D. Does the executive director submit to the board of directors written reports pointing up the need for improved facilities?

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E. Does the executive director make recommendations for expanding and improving the general program of the workshop?

.....

F. Have the recommendations of the executive director to the board of directors been formulated with the assistance of the staff?

.....

G. Does the executive director promote the work of service groups for the purpose of soliciting and receiving financial and other aid for the workshop?

.....

H. Does the executive director offer the evening use of the facilities for community purposes?

.....

I. Does the executive director conduct educational and publicity programs in the community?

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J. Does the executive director welcome and schedule visits to the workshop by community leaders and groups?

.....

K. Does the executive director interpret the program of the workshop to legislators and/or congressmen through working with an organized group?

.....

L. Does the executive director cooperate with other community agencies?

Y N A E

total

7. The executive director should employ all members of his staff, clearly set forth their duties and responsibilities, and designate the lines of authority and communication within the internal framework of the workshop.

.....

A. Does the executive director have authority to discharge as well as to hire members of his staff?

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B. Does the executive director delegate certain responsibilities to staff members but retain full authority and overall responsibility?

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C. Does the executive director display in a prominent place an organizational chart that delineates a progressive chain of command?

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D. Does the executive director distribute to all staff members a handbook that clearly sets forth their duties and responsibilities and designates the lines of authority and communication?

.....

E. Does the executive director maintain in a current file a complete list of staff jobs with descriptions, responsibilities, classifications, and qualifications, showing pay schedules for the respective positions?

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F. Does the executive director, before making major decisions, consult with appropriate staff members?

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G. Is the staff organized to facilitate free communication between production and professional staff members?

.....

H. Does the executive director hold regularly scheduled staff and departmental meetings?

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I. Does the executive director keep complete notes of all staff and departmental meetings?

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J. Does the executive director communicate policy matters, decisions, and regulations to his staff by posting typewritten reports on a bulletin board or hand distributing them?

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к. Does the executive director have due regard for the areas of specialization of staff members?

.....

L. Are all papers placed in the personnel files signed and dated by the interviewer?

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M. Does the executive director maintain written records of supervisory meetings with staff members?

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N. Is personnel administration fundamentally advisory and facilitative?

Y N A E

.....

total

8. The workshop should evidence its responsibilities and opportunities for service to the community and make full utilization of community resources.

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A. Does the executive director circulate workshop literature which is designed to increase the use of workshop services by handicapped individuals and by health and social service agencies of the community?

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B. Does the executive director keep a current directory of community and regional resources?

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c. Does the workshop utilize other community services?

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D. Does the executive director explore all avenues of cooperation with government and community agencies?

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E. Does the workshop constructively cooperate with other workshops or related agencies in the community?

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F. Does the executive director maintain a record of cooperation with other workshops or related agencies in the community?

.....

G. Does the executive director keep financial records of monies spent in community activities?

.....

H. Does the executive director exchange publications, bulletins, and miscellaneous releases with other workshops and agencies in the community?

.....

i. Does the workshop have a planned information program which is directed to various specialized groups of the community?

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j. Does the executive director serve on lay and professional community committees and panels?

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к. Is the executive director personally active in community health and welfare organizations?

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L. Is the executive director an active member of local civic and social groups?

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m. Does the executive director keep a record of the activities of staff members in civic and social service groups?

.....

N. Does the executive director keep a calendar of current community activities?

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o. Does the executive director keep a file of important community activities that have demonstrated interest and usefulness in the workshop program?

.....

P. Does the executive director supply copy to the local newspaper showing workshop activities?

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Q. Does the executive director sponsor a program of public information to help professional, lay, or parent groups better understand the importance of the workshop in the community?

.....

R. Does the executive director make the workshop facilities available to selected community groups?

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S. Is the executive director registered with a local speakers bureau?

.....

T. Does the executive director handle all correspondence promptly?

.....

U. Does the executive director make the community conscious of its responsibilities to the workshop?

.....

V. Does the executive director keep those who make financial contributions to the workshop well informed about the constructive use to which their contributions have been put?

.....

W. Does the executive director establish good rapport in the community?

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X. Is the workshop program of interpretation to the community planned and carried out on the principle that beneficial results to the workshop may not necessarily be forthcoming immediately but may be delayed for an indeterminate period of time?

Y N A E

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total

9. The executive director and board of directors should demonstrate their responsibility for progress in the workshop field.

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A. Are reasonable funds provided in the budget for subscriptions to professional journals and the addition of new books to the staff library?

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B. Does the workshop have a formalized staff training program?

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C. Does the executive director have printed outlines, schedules, or program of staff training?

.....

D. Does the annual budget provide for staff development and needed surveys?

.....

E. Does the board of directors grant released time to staff members, without loss of pay, to attend conferences, conventions, and institutes that have an important interest in workshops?

.....

F. Does the board of directors encourage the community to provide grants, scholarships, and endowments for workshop staff development?

.....

G. Does the workshop have official agreements with any universities and colleges for field training placement?

.....

H. Does the executive director invite persons with special qualifications to the workshop as consultants and speakers?

.....

I. Do the executive director and other staff members hold memberships in professional groups?

[The page contains faint horizontal lines and a small mark near the bottom left corner.]

- J. Are professional membership dues paid from workshop funds?
- K. Does the workshop program offer salary incentives to staff members for purposes of observation of workshops?
- L. Does the workshop provide travel incentives to staff members for purposes of observation of workshops?
- M. Does the executive director actively recruit applicants with high qualifications?
- N. Does the executive director submit contributions on practices or research for publication in professional journals?
- O. Are staff members appropriately recognized for their contributions to professional journals?
- P. Does the executive director thoroughly orient the board of directors regarding needs for program research and evaluation?
- Q. Does the board of directors have a permissive policy that enables the executive director to undertake research and demonstration in the workshop in cooperation with qualified research bodies?

Y N A E

total

10. The executive director should adhere to sound business and financing practices that are recognized by the appropriate professional groups.

- A. Does the executive director maintain a business reference library that will give the staff authoritative information about: accounting, purchasing, procurement, banking, business management, retailing and selling, merchandising, marketing, sales and production contracts, inventory, control, quality, control, methods engineering, etc.?
- B. Has the bookkeeping system been set up by a firm of certified public accountants?
- C. In his cost accounting, can the executive director determine the cost of any single department, service, or operation for a given period?
- D. Does the cost accounting system reflect rehabilitation costs?
- E. Does the board of directors engage a firm of certified public accountants to make an annual audit of the workshop books?
- F. Does the workshop manager maintain in his office permanent files of:
(1) requisitions, (2) purchase orders, (3) purchase journals, (4) work contracts, (5) shipping memoranda, (6) sales records?
- G. Is all workshop purchasing done centrally?
- H. Does the workshop require not less than three quotations from sellers before making purchases?
- I. Are required specifications stipulated when sellers are invited to submit quotations?
- J. Are standard cost factors (**) used when submitting competitive bids?
(See pages 44-45.)
- K. Does inventory control relate inventory to turnover?

.....

L. Does the workshop manager maintain a time and progress schedule on every job being done under contract?

.....

M. Is rigid quality and quantity control maintained to insure compliance with customer specifications?

.....

N. Do labeling and pricing conform to the quality of the products offered for sale?

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O. Are the sales of workshop products made on the basis of price and quality and not on an overstated emotional appeal?

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P. Has the workshop adopted a trademark?

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Q. Does the trademark identify the workshop product without exploitation of disability?

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R. Has the trademark been registered with the Trademark Operations of the U. S. Patent Office?

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S. Does the workshop have a continuing program of new product development?

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T. Has the workshop obtained patents on any of its products from the U. S. Patent Office?

.....

U. Does the workshop have a printed schedule of fees for services?

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V. Are only bona fide cost factors used for determining fees for workshop services?

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W. Are bills paid promptly in accordance with the terms of purchase?

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X. Does the workshop carry insurance on customers' goods?

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Y. Does the workshop carry insurance on its trucks?

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Z. Does the workshop sell its products at competitive prices and avoid undercutting commercial industry and other workshops?

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AA. Does the workshop accept subcontracts only at competitive prices and avoid undercutting commercial industry and other workshops in negotiating for such work?

Y N A E

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total

11. Production procedures should be in accordance with those used in competitive industry except that they should be geared to the limitations and capacities of the handicapped clients.

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A. Is sound methods engineering, geared to the limitations and capacities of the handicapped clients, applied to every production operation?

.....

B. Is there orderly and progressive flow of production operations?

.....

C. Does the workshop manager conduct periodic studies of: (1) lay-out, (2) materials arrangement, (3) work flow, (4) job simplification, and (5) standardized packaging?

.....

D. Does the workshop manager seek technical assistance from the prime contractor's engineers?

- E. Does the workshop manager use the services of consulting engineers whenever he encounters special problems?
- F. Does the workshop manager make use of time and motion studies and flow rates available for comparable operations in industry?
- G. Are materials and equipment located for maximum efficiency, convenience, and comfort?
- H. Does the workshop manager have equipment and tools re-engineered to accommodate the special needs of clients?
- I. Does the executive director frequently confer with the workshop manager to analyze production reports for improving product quality?
- J. Can the workshop manager furnish written evidence to show that product quality meets the specifications of the prime contractor?
- K. Does the workshop manager maintain a visual cardex file showing: (1) contract completion dates; (2) status of progress of each contract?
- L. Does the workshop manager establish the client's production norms on the basis of such factors as: (1) capacities, (2) limitations, (3) work tolerance, (4) emotional status, and (5) environmental influences?
- M. Does the workshop manager periodically review and revise the client's production norms?
- N. Does the workshop manager prepare client charts and graphs that show progress in production efficiency?
- O. Does the workshop manager adjust the ratio of supervisors to workers as may be justified by complexity of job and clients' problems?
- P. Is the workshop manager always receptive to hearing the inquiries and grievances of clients?
- Q. Are clients rewarded for making constructive suggestions regarding production operations?
- R. Is the workshop environment and climate commendable but not so comfortable that it will encourage the client to delay his leaving the workshop for industry?
- S. Is systematic attention given to development of: (1) new products and (2) new markets?
- T. Does the workshop manager complete samples when a new job or a new customer is in prospect?
- U. Does the workshop have certain open-end contract jobs which are processed whenever there is a lag in orders from regular customers?

Y N A E

total

12. The workshop should be certificated by the Wage and Hour and Public Contracts Divisions of the U. S. Department of Labor, where applicable; adhere to federal and/or state wage and hour regulations, where applicable; and maintain wage standards comparable with prevailing wage or piece rate standards for similar production in industry.

A. Is the workshop certificated by the Wage and Hour and Public Contracts Divisions of the U. S. Department of Labor? (2)

B. Does the workshop holding a Federal Wage and Hour Certificate display, in a conspicuous place, a poster which explains the terms of the certificate?

C. Does the executive director have an up-to-date digest of federal, state, and local labor laws? (3)

D. Are all applicable federal, state, and local labor laws affecting the workshop being fully complied with?

E. Does the workshop comply with all applicable wage and hour regulations set forth in the Federal Wage and Hour Law and the Walsh-Healey Public Contracts Act? (4)

(1) Does the workshop apply the standards set by the Federal Wage and Hour Certificate to all clients engaged in interstate or foreign commerce or in the production of goods for such commerce, including operations closely related or directly essential to such production?

(2) Does the workshop apply the standards set by the Federal Wage and Hour Certificate to all clients, including those in state-operated workshops, who help manufacture, handle, assemble, or ship items called for by a federal government contract which may exceed \$10,000?

(3) Does the workshop apply the certificate standards to homeworkers, doing work subject to the Federal Wage and Hour Law and the Walsh-Healey Public Contracts Act?

(4) Does the workshop pay at least time and one-half the client's regular rate of pay for all hours worked over 40 in the workweek when the Federal Wage and Hour Law applies?

(5) Does the workshop pay at least time and one-half of the client's regular rate of pay for all hours worked over 8 a day or 40 in the workweek, whichever number of hours is greater, when the Walsh-Healey Public Contracts Act applies?

(6) Does the workshop include bonuses, such as group production bonuses and bonuses for quality or accuracy, in the regular rate when computing overtime pay?

(7) Does the workshop pay all its non-handicapped workers when doing work subject to the Federal Wage and Hour Law at least the statutory minimum wage and not less than time and one-half for all hours worked over 40 in the workweek?

- (8) Does the workshop comply with standards set by state laws and municipal ordinances when such standards are higher than those set by the Federal Wage and Hour Law or the Walsh-Healey Public Contracts Act?
- (9) Does the workshop operating without a Federal Wage and Hour Certificate pay all clients at least the applicable minimum wage if engaged in work subject to the Federal Wage and Hour Law or the Walsh-Healey Public Contracts Act?
- (10) Does the workshop pay at least the minimum rates in the Federal Wage and Hour Certificate to all clients to whom the certificate applies?
- (11) Does the workshop pay clients on a piece rate basis, insofar as possible, to provide maximum incentive and to make the rewards for work commensurate with accomplishments?
- (12) Does the workshop pay clients on piece work not less than the prevailing piece rates paid non-handicapped workers doing the same work in regular commercial industry in the vicinity?
- (13) Does the workshop pay its clients at piece rates all that they earn when such earnings are greater than the minimum rates set in the Federal Wage and Hour Certificate?
- (14) Does the workshop pay clients on hourly rates (time rates) on the basis of their production in relation to that of non-handicapped workers in industry doing the same type of work, using the prevailing industry wage rate as a base?
- (15) Does the workshop pay both trainees and regular clients working at piece rates the same piece rates when they are doing the same work?
- (16) Does the workshop periodically check prevailing local industry piece rates and/or time rates to assure that client wage rates are based on current industry rates?
- (17) Does the workshop run a time study or other test when industry piece rates are unobtainable?
- (18) Does the workshop pay each client his individual piece rate earnings rather than pool all piece rate earnings and divide the total equally among all the clients?
- (19) Are the wage rates of clients paid at hourly rates (time rates) reviewed periodically?
- (20) Are all clients engaged in manufacturing or processing goods under the Federal Wage and Hour Law at least 16 years old, and clients engaged in occupations declared to be hazardous by the Secretary of Labor at least 18 years old?
- (21) Are all boys doing work under the Walsh-Healey Public Contracts Act at least 16 years old and all girls at least 18 years old?

- (22) Does the workshop comply with the safety and health requirements of the Walsh-Healey Public Contracts Act which require that work be performed under sanitary and safe conditions?
- (23) Where charges are made for room and board furnished the client, are such charges based on the fair value of comparable facilities and meals in the community?
- (24) Does the workshop furnish clients with medical, educational, therapeutic, and other such rehabilitative services without making deductions from wages for such services?
- (25) Does the workshop pay trainees, who receive subsistence allowances, pensions, etc., from a sponsoring agency, all that they earn in accordance with the same wage standards that apply to other clients in the workshop without any deductions from their wages for such allowances or pensions?
- (26) Does the workshop keep payroll records for clients showing: (a) full name, home address, and date of birth if under 19; (b) occupation; (c) time of day and day of week on which workweek begins; (d) regular hourly rate of pay for any week in which overtime pay is due; (e) hours worked each workday and workweek; (f) total daily or weekly straight-time earnings; (g) total overtime pay for the week; (h) total additions to or deductions from wages paid each pay period; (i) total wages paid each pay period, date of payment, and pay period covered by payment?
- (27) Does the workshop require its homeworkers to keep accurate records of hours worked as well as of items produced?
- (28) Does the workshop segregate its clients from the non-handicapped workers on its payroll or pay records?
- (29) Are payroll records and Federal Wage and Hour Certificates kept for a period of 3 years after last date of entry or last effective date?
- (30) Are piece work tickets, wage rate tables, and time cards kept for at least 2 years after employees have been properly paid?
- (31) Are executive, administrative, and professional employees doing work covered by the Federal Wage and Hour Law, who do not meet the required tests as to salaries, duties, and responsibilities (as set out in Regulations Part 541), paid at least time and one-half their regular rate for overtime after 40 hours a week?

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F. Are the federal and/or state regulations and standards applied to all workshop personnel, staff and clients, where applicable?

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G. Are workshop personnel, staff and clients, who are not subject to federal and/or state wage and hour laws accorded the same treatment for similar work as those workers subject to these laws?

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H. Are all state and local regulations governing working conditions complied with?

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I. Are time studies made with non-handicapped persons or handicapped persons who are fully productive for the work being tested?

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- J. Is allowance made for personal time and fatigue in making time studies?
- K. Does the workshop maintain a record of time studies, showing, among other things, the number of persons tested, the duration of the test period, the number of units tested, average production per hour, base rate used, and piece rate established as result of test?
- L. Does the trainee, whether or not placed in the workshop by a sponsoring agency, receive wages in line with his production when he works on saleable goods or performs useful services?
- M. Does the executive director have a definite policy on wage reviews and increments?
- N. Does the workshop manual contain a clear statement concerning policy and practice on wages?
- O. Do reports of wages paid to clients include an explanation of the bases upon which the wages were computed?

Y N A E

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total

13. The workshop should comply with federal and state regulations covering staff and client benefits and conform to local practice relating to fringe benefits.

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- A. Are all state and local government bulletins and notices of insurance carriers posted in the workshop as required?
- B. Does the workshop carry industrial accident insurance?
- C. Are the required payments under the Federal Insurance Contributions Act (for Social Security) made by the workshop to the Internal Revenue Service where applicable?
- D. Have clients been counseled regarding the provisions governing entitlement to Social Security benefits under the Social Security Act?
- E. Does the workshop make the required reports and payments to the Internal Revenue Service, where applicable, under the Federal Unemployment Tax Act?
- F. Does the workshop make the required Workmen's Compensation payments, where applicable, to the appropriate state agency?
- G. Does the workshop file the required information returns under Section 6041, Internal Revenue Code? (5)
- H. Does the workshop comply with the withholding and reporting requirements under Section 3402, Internal Revenue Code, covering wages subject to withholding?
- I. Does the workshop comply with all applicable state reporting requirements for corporations, public health agencies, and semi-public institutions?
- J. Does the executive director have a current compilation of federal Social Security laws? (6)

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- K. Is it the policy of the workshop to pay subsidies to long-term clients who are unable to meet productions standards?
- L. When a client's wages are subsidized, are the reasons therefor fully explained to him?
- M. Does the executive director make a periodic analysis of wage subsidies?
- N. Has the executive director taken an active part in conducting a study of prevailing client benefit practices in the community or region?
- O. Do fringe benefits for workshop clients and staff include: (1) paid legal holidays, (2) vacation with pay, (3) sick leave, (4) special leave, (5) group health insurance and hospitalization, and (6) retirement insurance?
- P. Are client benefits sufficiently conservative that they will not adversely affect motivation to enter competitive industry?
- Q. Are the production staff members effectively oriented by the executive director to expect and accept movement of clients out of the workshop?
- R. Can the workshop manager justify the retention of every long-term client in the workshop?
- S. Does the workshop have duplicate records of compliance with all legal requirements covering personnel benefits?

Y N A E

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- 14. ***The workshop, in its building, equipment, and operations, should manifest concern with the health, safety, and efficient performance of its staff and clients.***
 - A. Is the interior construction of the building designed to accommodate handicapped persons?
 - B. Has the workshop consulted with and received a written statement of approval from an industrial safety engineer, architect, or local building inspector regarding load-bearing safety for floor areas carrying machinery or heavy stock material loads?
 - C. Is the workshop equipment, machinery, and tools relatively comparable with that in industrial plants?
 - D. Has the workshop had the various equipment checked and stamped for safety by the appropriate inspection authorities?
 - E. Is the workshop adequately heated and ventilated?
 - F. Does the cubic or floor space per worker meet the standards set by applicable building or industrial codes?
 - G. Is workshop refuse and industrial waste disposal in accordance with local health and sanitation ordinances?
 - H. Do workshop lavatory facilities meet local and/or state health and sanitation regulations?
 - I. Are all workshop food handlers licensed where required by local ordinance?

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- J. Does the workshop meet all applicable city, county, and state fire and safety regulations?
- K. Does the workshop meet recommended lighting requirements for the type of job being done?
- L. Does the workshop library include manuals on safety, food handling, sanitation, and first aid?
- M. Are regular rest periods allowed the staff and clients?
- N. Can facilities be converted to staff and client recreational use?
- O. Is there a policy covering promotion incentives?
- P. Is there accident and liability insurance coverage for volunteers?

Y N A E

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total

15. The business enterprise should be conducted with constant and efficient endeavor to reduce the cost of production and distribution, to improve the quality of the products, to give fair treatment to customers, management, and labor, and to render client and public service of the highest value.

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- A. Does the workshop subscribe to the Code of Ethical Business Practice for Sheltered Workshops? (***) (See pages 46-47.)

**Standard Cost Factors

1. Material for manufactured components
2. Purchased parts or components, if any
3. Direct labor cost for complete end product
4. Overhead and indirect labor items which include:
 - A. Indirect labor
 - (1) Supervision
 - (2) Idle time
 - (3) Inspection
 - (4) Indirect labor payroll
 - B. Indirect material
 - (1) Fuel
 - (2) Light, heat, power, and water
 - (3) Shop supplies
 - (4) Small tools, jigs, and fixtures
 - C. Operating expenses
 - (1) Selling and advertising
 - (2) Administrative
 - (3) Trucking, delivery, and freight
 - (4) General
 - D. General overhead
 - (1) Maintenance and repairs on buildings
 - (2) Maintenance and repairs on machines, equipment and trucks
 - (3) Depreciation, deterioration, obsolescence on buildings, machines, equipment, and trucks
 - (4) Rent on buildings
 - (5) Taxes
 - (a) Workshop payroll
 - (b) Real estate
 - (c) Personal property
 - (d) Sales and use
 - (e) Federal Old Age and Survivors Insurance
 - (f) State Unemployment
 - (g) General
 - (6) Insurance
 - (a) Plant and equipment
 - (b) Fire
 - (c) Employees, including bonding
 - (d) Trucks and autos
 - (e) Fidelity bonds
 - (f) State Unemployment
 - (g) Forgery bonds
 - (h) Burglary
 - (i) State Workmen's Compensation
 - (j) Accident and health
 - (k) General liability
 - (l) Elevator
 - (m) Boiler and machinery

- (7) Waste, scrap, spoilage
- (8) Employee fringe benefits

- 5. Cost factors which, even under the most efficient management, increase the cost of workshop operations
 - A. Better grade of raw materials
 - B. Greater quantity of raw materials for handling and training
 - C. Slower adjustment to new operations
 - D. More supervision required in change-over from one process to another
 - E. More seconds and rejects during training and work experience
 - F. Adaptation and modification of tools and equipment
 - G. Turnover of productive clients
 - H. Multiple operations break-down requirements
 - I. Extra space, lay-out, and conveyor requirements
 - J. More waste through variable tolerances
 - K. Frequency of estimating without established norms
 - L. Frequency of calculation of piecework rates
 - M. Responsibility for surveying and soliciting placement opportunities
 - N. Non-productive idle time
 - O. Provision of transportation for clients
 - P. Provision of meals and lodging
 - Q. Provision of wage subsidies
 - R. Non-subsidized portion of service program
 - S. Professional obligations of social service
 - T. Community services.

***Code of Ethical Business Practice for Sheltered Workshops

I

These high standards of business practice rest upon philosophical and ethical considerations to which the sheltered workshop is dedicated. Business practice in the sheltered workshop is governed by and designed to implement human values which are the fundamental concern of a rehabilitation facility.

II

The highest standards of ethics, integrity, and fair dealing govern all transactions and relations between Workshop and Client, Industry, Labor, and Community.

III

The foundation of business is confidence, which springs from integrity, fair dealing, efficient service, and mutual benefit.

IV

The workshop renders its services and conducts its business as to deserve and inspire public confidence.

V

Equitable consideration is due in business alike to Management, Clients, Staff, and the Community.

VI

Practical knowledge and constant study of the factors affecting the workshop as a business enterprise are essential to its success in giving efficient service to the community.

VII

Permanency and continuity of service are basic aims of business, that client knowledge and experience gained may be fully utilized and efficiency increased.

VIII

The workshop as a business enterprise is obligated to itself and to the community to strive for continuity of operation, and for bettering conditions and opportunities for employment of clients.

IX

Contracts and undertakings, written or oral, are performed in letter and spirit.

X

Competitive bids preferably are submitted only when a definite time and place for the opening of all proposals has been fixed at which all bidders are permitted to be present.

XI

To seek or accept information or the figures concerning a competitor's bid prior to the opening of bids and the award of contract is unfair.

XII

When bids are solicited and received by a prime contractor on a lump sum basis, no competitor solicits the work on a percentage basis, or any other form of cost-plus contract basis.

XIII

Solicitation of subcontracts from prime contractors is made only when the workshop is fully qualified to perform the proposed contract or to render the proper service.

XIV

Failure to include all applicable standard cost factors when submitting competitive bids is unfair.

XV

Representation of products and services is truthfully and scrupulously fulfilled, and disability is not exploited.

XVI

Waste in any form—of capital, labor, materials, or services—is not condoned, and constant effort is made for its elimination.

XVII

Excesses in expansion, buying, and stimulation of sales are frowned upon.

XVIII

Agreements with referral agencies for evaluation, training, or other services are made only when the workshop is fully qualified in staff, facilities, and program to render the given service.

XIX

Fees for services to clients are uniform and based upon bona fide cost factors.

XX

Lawful cooperation among Workshops, Community Agencies, Labor Organizations, and Business Enterprises in support of these principles of business practice is commended and encouraged.

Y N A E

total

- A. Is the staff organized to effectively carry out the designated program of workshop services?
- B. Have the current needs of the workshop been analyzed as a basis for staffing?
- C. Have the purposes of the workshop been examined as a determinant for staffing?
- D. Have the various aspects of the workshop program been defined as a basis for staffing?
- E. Are part-time or full-time staff positions created as the need arises for basic or special services?
- F. Is there flexibility of assignment to accommodate the changing needs of the workshop?
- G. Are positions classified?
- H. Are lines of administrative and supervisory responsibility clearly designated?
- I. Is there an organizational chart showing clearly line and staff responsibility?
- J. Does staff organization promote accessibility of members to each other?
- K. Are democratic procedures used to arrive at decisions affecting the staff as a whole?
- L. Are the individual schedules of staff members well integrated?
- M. Does the staffing pattern foster the team concept?
- N. Is a client retained, remunerated, and otherwise given full staff status when he meets the required qualifications for a particular staff position?

Y N A E

total

- A. Are the bases for determination of the ratio of staff members to clients stated in writing?
- B. Are the following variables considered in determining the ratio of staff members to clients: (1) services offered, (2) nature and severity of disability, (3) physical plant and equipment, (4) type of jobs performed by clients, (5) class of work performed by staff member, and (6) desired quality of service?
- C. Are adjustments made as indicated by the following variables: (1) type of work load, (2) degree of fluctuation of work load, (3) change in character of handicapped clientele, and (4) changes in programs of clients?

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- D. Are differentiations of staff-client ratio made for various aspects of the workshop program?
- E. Are certain weights in the work load assigned to such duties as: (1) supervision of volunteers, (2) supervision of interns, (3) assistance with research project, (4) interagency liaison, and (5) community relations responsibilities?
- F. Is the ratio based only upon the number of staff members engaged in direct services to clients?
- G. Does the ratio account for the use of qualified volunteers?
- H. Are multiple assignments for staff members considered in arriving at the existing ratio?
- I. Are recommendations for caseloads in the related professions used as guides?
- J. Is consideration given to equalizing workload in staff positions not concerned with direct services to clients?
- K. Does the executive director view adequate staffing realistically in terms of budget planning?

Y N A E

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3. There should be available a current job description, job analysis, and list of required qualifications for each staff position.

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- A. Are job descriptions and required qualifications available for each of the applicable staff positions, such as: (1) executive and administrative (executive director, workshop director, clerical workers, accountant, public relations specialist); (2) operating and production (production manager, contract supervisor, shop foreman, industrial engineer, shipping supervisor, estimator, procurement and contract officer); (3) marketing and merchandising (sales and merchandising supervisor, distribution supervisor, product designer, pricing and cost analyst, salesmen; (4) professional and technical (vocational counselor, placement specialist, case worker, social worker, psychologist, nurse, occupational therapist, physical therapist, physician, prosthetist)?
- B. Are the job descriptions, analyses, and required qualifications a part of the personnel manual of the workshop?
- C. Are job descriptions, analyses, and required qualifications available for staff members and recruits?
- D. Are periodic revisions made with the cooperation of staff members to keep the job descriptions, analyses, and required qualifications up-to-date?

Y N A E

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4. Personnel policies and practices should be stated in a manual.

- A. Is there a statement of salary practices governing: (1) range or scale, (2) frequency of pay period, (3) amount of and basis for salary increments, (4) deductions, (5) overtime and compensatory time, (6) provision for adjustments?

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- B. Has the statement of salary practices been derived cooperatively with the staff?
- C. Has the statement of salary practices utilized the advisory assistance of pertinent national professional associations? (7)
- D. Has the executive director consulted with heads of similar agencies to ascertain whether his workshop salary practices were comparable in the region and in the nation?
- E. Is there provision for periodic review of salary practices?
- F. Is there a policy statement relating to employee benefits such as: (1) sick and special leave, (2) holidays and vacations, (3) health and retirement insurance, (4) accident and liability insurance, (5) amount and conditions of travel, (6) Social Security, Unemployment Insurance, and Workmen's Compensation?
- G. Is the statement of policy regarding employee benefits subject to modification?
- H. Are personnel practices outlined relating to: (1) recruitment, (2) hiring, (3) separation, (4) health examinations, (5) probation, (6) promotion, (7) performance evaluation, (8) supervision?
- I. Does staff morale, as expressed in mutual respect and easy sociability, reveal an understanding of and confidence in the workshop's personnel practices?
- J. Does the manual cover volunteers?

Y N A E

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5. The workshop should maintain a confidential personnel file for each staff member.

- A. Does the individual's personnel file contain records of: (1) application, (2) appointment and acceptance, (3) physical examination, (4) agreements, (5) revisions of job description, (6) salary increases, (7) supervisory notes, (8) job performance evaluations, (9) special commendations, (10) special assignments, (11) educational, conference, and in-service training activities, (12) community activities, and (13) notice of separation?
- B. Is the personnel file utilized in staff supervision for the improvement of services?
- C. Is the personnel file reviewed periodically and used as a basis for promotion?
- D. Is the personnel file regarded as confidential information available only to the proper level of authority?

Y N A E

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6. The workshop should administer an in-service training program; and it should encourage and facilitate professional and educational activities of staff members.

- A. Does the in-service training program provide for: (1) induction, (2) orientation, (3) supervision, and (4) evaluation?

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- B. Are there set procedures for the following: (1) initial interview for general orientation to workshop and community, (2) early interviews concerning specific programs, problems, and duties, (3) follow-up interviews for continued supervision in new assignment?
-
- C. Is special attention and time given to the early guidance of new staff members, particularly inexperienced persons?
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- D. Do supervisory conferences accomplish these things: (1) delineate a plan for individual growth and development of staff member: (2) give a satisfying sense of career status to the staff member?
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- E. Does the work performance rating emphasize the strengths of the staff member?
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- F. Is supervision always positive and constructive?
-
- G. Are supervisory and administrative decisions, executive action and performance evaluation discussed privately with the individual staff member shortly after they are made?
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- H. Are some of the following types of meetings utilized for in-service training: case staffing, interdepartmental meetings, interdisciplinary meetings, interagency conferences, community planning meetings, staff meetings on workshop problems and planning?
-
- I. Does the workshop use, in its in-service training program, some of the following techniques: demonstration, lecture, seminar, field trip, audio-visual materials?
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- J. Is there an equitable plan for participation of staff members in such activities as the following: professional association meetings, rehabilitation conferences, institutes on industrial techniques, short courses on labor relations, cooperative research?
-
- K. Are staff members encouraged: (1) to continue academic studies, (2) to work with staff members of certain disciplines or experience, (3) to read in pertinent professional and technical areas, (4) to cooperate with community studies, (5) to write for professional association journals?
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- L. Does the workshop staff take advantage of opportunities for such educational activities as: (1) consulting with technical specialists, (2) attending short courses in quality control, etc., conducted by local industry, (3) attending seminars sponsored by technical societies, (4) participating in informal discussions under the leadership of professional persons from a university, (5) attending panel discussions of an employers council or group of placement specialists?
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- M. Does the workshop have any of the following: (1) a specialized library which has current acquisitions, (2) a reading circle through which staff members share reading and reporting of new books to keep abreast of relevant information, (3) a system of reviewing and annotating pertinent periodical literature to reduce the volume and afford selectivity of reading, (4) a library service which prepares summaries of contemporary research of relevance to the workshop situation?

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- N. Are fresh viewpoints stimulated by use of the bulletin board in any of the following ways: (1) notices of speeches by businessmen, advertising executives, public health officers, etc.; (2) references to helpful current reading; (3) programs of forthcoming meetings of professional interest; (4) announcement of the assignment of an intern to the workshop; (5) calendar of informal discussions with local colleagues?
-
- O. Does the workshop foster in-service training in any of the following ways: (1) promotion of scholarships for advanced study, (2) stipends for assigned study, (3) reimbursement of travel expenses for attendance at meetings or for field trips, (4) publication of newsletter, historical background of the agency, findings of self-survey of workshop, (5) participation in research projects, (6) field training experience, (7) cooperative training programs of state agencies, (8) training institutes sponsored by federal agencies, (9) short courses conducted by the American Management Association, (10) seminars of local chapters of the American Marketing Association?
-
- P. Are staff meetings planned, purposeful, substantive, and of appropriate subject matter?
-
- Q. Are administrative and problem-solving staff meetings distinctly separate?
-
- R. Does the in-service training program cover the following: (1) volunteers who serve the workshop in varied capacities, (2) new board members who need orientation, (3) clients who have a potential for becoming instructors, foremen, janitors, truckers, etc., (4) liaison persons from referral agencies?
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- S. Does the workshop provide informal guidance, rather than a formalized program of in-service training, for staff members?
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- T. Has there been any improvement in the quality of workshop services which seems to be traceable to the in-service training program?

Y N A E

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- total
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- 7. The workshop should make selective and structured use of volunteers for expanding its program.**
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- A. Are the needs of the client paramount in the use of volunteers?
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- B. Does the workshop have a policy with respect to selective recruitment of volunteers?
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- C. Are qualifications required of a volunteer the same as those of a person appointed to the staff for a given position?
-
- D. Are volunteers under the supervision of qualified staff members?
-
- E. Is there provision for in-service training for volunteers, having special emphasis on orientation?
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- F. Does the use of volunteers directly expand the program?
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- G. Are schedules of volunteers who work directly with the clients geared to the convenience of the workshop?

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- H. Is selective use of volunteers made in areas such as: office work, recreational leadership, teaching, public relations, craft instruction, fund raising, food service, psychometric testing?
- I. Is material, acquainting the reader with the background, purposes, program, and needs of the workshop, available to those who wish to serve as volunteers?

Y N A E

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8. The workshop should accept interns insofar as their use strengthens the program.

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- A. Have the following factors been considered in arriving at a decision concerning the use of interns: (1) work load of staff, (2) accreditable qualifications of staff members, (3) suitability of program for internship, (4) adequacy of facilities, (5) distance of workshop from academic center, (6) preference of staff for other projects, (7) mutual value to workshop program?
- B. Does the staff desire to accept interns?
- C. Has the workshop been approved by an interested academic institution for providing practical training for interns of a specified department?
- D. Has the executive director taken action by telephone, letter, or personal contacts to arrange for the assignment of an intern by a university department head?
- E. Has the workshop established a continuing working relationship with a university with respect to internships, research, and consultation?
- F. Does the executive director feel a professional responsibility for recruitment and training of workshop personnel?

Y N A E

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total

9. Workshop personnel should meet the qualifications and requirements of their respective professional associations and/or state certification in areas of human relations and rehabilitation, where applicable to the workshop position; should be experienced in or oriented to industrial practices; and should be able to adapt their knowledge and skill to the special problems of handicapped workers and the sheltered work environment.

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- A. Do workshop personnel meet the qualifications and requirements of their respective professional associations? (8)
- B. Do workshop personnel meet applicable state certification or licensing requirements?
- C. Have both professional and operating personnel been experienced or otherwise oriented to business and industrial practices?
- D. Have both operating and professional personnel been oriented to the role of the workshop in the rehabilitation process?

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|-------|-------|-------|-------|---|
| | | | | E. Are professional staff members able to adapt their knowledge and skill in areas of human relations and rehabilitation to the industrial setting? |
| ..... | ..... | ..... | ..... | F. Are operating staff members able to adapt their knowledge and skill in business and industrial practices to the special problems of handicapped workers in the sheltered work environment? |
| | | | | G. Do all staff members, particularly those without previous workshop experience, have understanding and insight with respect to the unique role of the workshop in rehabilitation? |

D. FACILITIES

Y N A E

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|-------|-------|-------|-------|--|
| | | | | 1. The workshop should be located in a suitable community environment accessible by public transportation. |
| total | ..... | ..... | ..... | A. Is the workshop located in a good business, commercial, or industrial neighborhood? |
| ..... | ..... | ..... | ..... | B. Is the location zoned for industrial use? |
| ..... | ..... | ..... | ..... | C. Is the workshop located in a respectable neighborhood? |
| ..... | ..... | ..... | ..... | D. Is the neighborhood in a sound state of maintenance? |
| ..... | ..... | ..... | ..... | E. Is urban renewal underway in the area adjacent to the workshop? |
| ..... | ..... | ..... | ..... | F. Is the workshop area a part of a community redevelopment plan? |
| ..... | ..... | ..... | ..... | G. Has the technique of spot-mapping been used to determine the greatest concentration of potential clients? |
| ..... | ..... | ..... | ..... | H. Is the workshop located in the area of greatest concentration of clients? |
| ..... | ..... | ..... | ..... | I. Is the workshop within reasonable distance of social services and medical facilities that may be required by the clients? |
| ..... | ..... | ..... | ..... | J. Is the workshop located on or near major public transportation lines? |
| ..... | ..... | ..... | ..... | K. Is the workshop accessible with a limited number of transfers from one bus to another from all sections of the city? |
| ..... | ..... | ..... | ..... | L. Is public transportation service frequent? |
| ..... | ..... | ..... | ..... | M. Are bus stops within a short walking distance of the workshop? |
| ..... | ..... | ..... | ..... | N. Is the workshop relatively accessible for clients who provide their own transportation? |
| ..... | ..... | ..... | ..... | O. Is public parking available in the immediate vicinity of the workshop? |
| ..... | ..... | ..... | ..... | P. Are there eating facilities approved by the public health department near the workshop? |
| ..... | ..... | ..... | ..... | Q. Is the neighborhood safe, with adequate police protection? |
| | | | | R. Is there adequate street lighting to make the workshop safe and usable at night? |

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s. Are approaches and exits engineered for safety?

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t. If the area is congested, is there adequate traffic control in the form of traffic lights, marked crossings, safety islands, and uniformed patrol?

Y N A E

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total

2. The site of the workshop should be suitable and large enough to permit expansion of the plant as needed.

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A. Has adequacy of the existing site been appraised?

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B. Has an adequate site survey been made by a competent firm or consultant?

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C. Does the character of the land allow for heavy construction?

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D. Have zoning trends and restrictions been investigated?

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E. Have urban renewal plans which may involve the workshop site been studied?

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F. Have the present and future uses of the surrounding area been considered in site selection?

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G. Has the workshop considered population growth and shifts anticipated for the next decade?

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H. Has there been consultation with the public utilities authorities on problems that may arise with respect to water, electricity, sewerage, telephone, and transportation?

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I. In purchasing a site, have the following factors been considered: (1) present property values in the area, (2) probable resale value of site, and (3) comparable value of adjacent land?

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J. Has the workshop met the site selection stipulations attached to: private grants or trusts, government grants or loans, or quasi-public financing?

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K. Has the size of the site been determined by the size and type of building needed?

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L. Does the site lend itself either to vertical or to horizontal expansion?

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M. Will the site permit the construction of additional floors or wings without unduly interrupting workshop operations?

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N. Does the workshop own or hold an option on available land for expansion?

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O. Can the workshop acquire adjacent properties at reasonable price?

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P. Has the city street department been consulted about projected plans for paving or widening streets and for modifying the traffic pattern?

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Q. Have steps been taken to acquire additional space in the building?

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R. Has provision been made for expansion by means of flexible floor plans?

Y N A E

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total

3. The construction should be in keeping with present-day industrial design and meet all applicable building codes.

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A. Has the modern industrial trend toward one-story, bay-type, construction been seriously considered in the choice of design?

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- B. Are construction materials easily maintained?
- C. Has noise control been considered in the construction or remodeling of the building?
- D. Has the building been checked for floor weight capacity, especially where machinery exerts a downward thrust?
- E. Are remodeling plans sound as to: (1) functionality, (2) appearance, (3) long-range economy, and (4) reasonable financing?
- F. Have modern materials been used for construction or remodeling in both interior and exterior?
- G. Does the construction meet all applicable building codes? (9)

Y N A E

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4. Architectural design of the plant should provide for maximum flexibility in adapting floor space and utilities to changing needs of the workshop.

- A. Have the services of a licensed architect been engaged directly or through a construction firm?
- B. Has the architect consulted with the executive director and staff concerning needs and character of the workshop program?
- C. Are areas for administration, storage, and service functions grouped and designed for practical use?
- D. Are partitions adjustable?
- E. Have plans for electric wiring, plumbing, water mains, gas lines, sewerage, communications, and waste disposal been made with a view toward potential expansion?
- F. Is the building functional for purposes of the workshop? (10)

Y N A E

total

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5. Workshop space should be provided and arranged in accordance with efficient industrial planning.

- A. For administrative and professional offices, are most of the following conditions met?
 - (1) Are partitions movable?
 - (2) Are offices multi-functional?
 - (3) Is there an alcove for a staff library in the office area?
 - (4) If private offices are not provided, is privacy augmented by partial enclosure, sound proofing, and scheduling of use?
 - (5) Are offices centrally located and readily accessible to shop staff and clients?
 - (6) Is the office area compact?
 - (7) Is the office of the executive director separate and private?
 - (8) If professional offices are not private, are there ample conference rooms, used on a rotating schedule, which insure privacy?

- (9) Is there a small staff conference room in the office area?
- (10) Is there a central conference room of capacity large enough for full staff meetings, interagency meetings, and board meetings?
- (11) Are the offices arranged so that one receptionist can serve all of them?
- (12) Are offices located in the same building with the workshop?
- (13) Is there a central file room or area in the office area?
- (14) Are staff cloak rooms and rest rooms located in the office area?
- (15) Are personnel offices easily accessible to the client?
- (16) Are rooms used for interviewing isolated from work areas to escape noise and traffic confusion yet easily accessible to clients?

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B. For production operations, are most of the following conditions met with regard to space?

- (1) Has a production engineer been consulted?
- (2) Are the units flexible by means of movable partitions?
- (3) Is the production area an open space plan, easily adaptable to the changing needs of the shop?
- (4) Is the production area laid out to facilitate a proper flow of materials in and out of the shop?
- (5) Is the work space for production operations sufficient to accommodate the number and type of clients served?
- (6) Is there adequate space for storage, particularly for materials needed immediately?
- (7) Is suitable space allotted to supervisory functions?
- (8) Is there available space for the addition of conveyors and the use of mechanical lifts?
- (9) Are freight elevators placed in locations that expedite efficiency?
- (10) Has space been conserved by palletizing?
- (11) Has provision been made for stock bays in production area?
- (12) Has space been reserved for routine paperwork in the shop area?
- (13) Have aisles been designated for handling material with mechanical equipment?
- (14) Do aisles have turn-out areas for passage of wheelchairs?

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C. For storage, stock control, and shipping, does space meet most of the following conditions:

- (1) Is there adequate floor space for the average work load?
- (2) Is the storage area of a size and arrangement to be: clean, uncluttered, dustproof, fire resistant, accessible to work area, well supervised, protected against theft, centrally located to all production operations?
- (3) Does outside storage have adequate provisions for weather and security?
- (4) Is there a central stockroom to eliminate duplication of effort and over-stocking and to expedite handling of deliveries and shipping?
- (5) Is there sufficient space for the easy movement of mechanical equipment?
- (6) Is there adequate separate storage for raw and processed materials during a typical period?

- (7) Do floor plans provide space for both long-range and short-range storage?
- (8) Does the workshop own or rent warehouse space for bulk or dead storage?
- (9) Is dead storage space provided for equipment not in current use?
- (10) Is storage space adjacent to shipping and receiving area?
- (11) Have storage racks and bins been provided for maximum use of area?
- (12) Is on-floor storage space held to a minimum of designated places?
- (13) Does storage arrangement facilitate inventory control?

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D. For housekeeping and service functions necessary to the maintenance of an efficient production operation, are most of the following conditions met?

- (1) Has provision been made for boiler, mechanical ventilation, and dehumidification space?
- (2) Is space provided for wash rooms and locker rooms adjacent to the work area?
- (3) Is there both central and on-the-floor storage space for housekeeping supplies?
- (4) Has space been planned to allow for: (a) health and safety apparatus, (b) equipment for servicing machines, (c) janitorial equipment and supplies, (d) tools and materials for building maintenance?

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E. For conference and waiting rooms, are most of the following conditions met?

- (1) Are meeting rooms large enough to accommodate workshop and community needs?
- (2) Do conference rooms lend themselves to adjustable partitioning?
- (3) Is the waiting room of sufficient size to accommodate the average daily demands?
- (4) Is the waiting room of such size that it does not appear crowded with comfortable furnishings?
- (5) Is the waiting room near the entrance and adjacent to the personnel offices?

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F. For lunch, model home, recreation, chapel, multi-purpose, and residential rooms, are most of the following conditions met?

- (1) Is the lunchroom sufficiently removed from the work area to be free from odors, noise, and air pollution?
- (2) Do the model home rooms permit typical and flexible arrangement of furnishings?
- (3) Is there planned space for social and recreational activities?
- (4) Is ample check-room space available near multi-purpose and other rooms accommodating large numbers?
- (5) Is the recreational area large enough for social activities of the workshop?
- (6) Can auditorium and stage accommodate wheelchair clients?
- (7) Is there storage space located conveniently for stage, recreational, dining, and other properties?
- (8) Is there a smoking lounge near the work area?

- (9) Is outdoor space available for recreational activities?
- (10) Is special or convertible space provided for religious services?
- (11) Is the multi-purpose room large and flexible enough to meet the needs of planned activities?
- (12) Is the multi-purpose room easily accessible from entrance to work area?
- (13) Are residence buildings for clients separate from the workshop facility?

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 G. For loading docks, are most of the following conditions met?

- (1) Is there safe and easy ingress and egress for trucks of all sizes?
- (2) Are there a sufficient number of stalls to permit waiting trucks to pull in to prepare to load or unload?
- (3) Do loading docks have external and internal ease of access?
- (4) Do loading platforms accommodate varying truck-bed heights?
- (5) Is there sufficient truck area to permit end and side loading?
- (6) Are loading docks of sufficient size to handle large quantities of materials efficiently?
- (7) Is there sufficient space on the loading docks to permit easy operation of mechanical lifts, cranes, conveyors, and built-in scales?
- (8) Are loading docks adjacent to work area to minimize handling of materials?
- (9) Are loading docks near central stock room?
- (10) Are loading docks arranged for an efficient flow of incoming and outgoing materials?
- (11) Are loading facilities near freight elevators?
- (12) Is loading area protected from the weather?

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 H. For parking, are most of the following conditions met?

- (1) Has space been provided for a receiving area for severely handicapped or non-ambulatory clients?
- (2) Is there adequate parking space for: clients, staff, customers, and visitors?
- (3) Has space been allowed for maneuverability in parking?

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 I. For landscaping, are most of the following conditions met?

- (1) Are approaches to the building surfaced?
- (2) Have the grounds been planned to get maximum usefulness of the area?
- (3) Is the landscaped area economical to maintain?
- (4) Has the landscaping been planned for all-season attractiveness?

Y N A E

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6. Interior decoration should be in keeping with current industrial practice and designed to create a favorable environment for rehabilitation.

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 A. Has the color scheme for walls been planned with the following considerations: cheerful atmosphere, economical maintenance, and proper illumination?

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- B. In the office area, have the following factors been operative in selecting furnishings: suitability, flexibility, durability, attractiveness, economy, and appropriateness for industrial setting?
- C. Are office, training, production, and other areas clearly marked?
- D. Are signs and name plates on doors uniform and neat?

Y N A E

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total

7. The workshop should meet all applicable local, state and national fire and safety codes, and, in addition, obtain periodic safety inspection by appropriate officials.

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- A. Does the workshop adhere to all applicable local, state, and national fire safety codes? (11)
- B. Is the workshop governed by applicable industrial safety codes? (12)
- C. Is the storage of inflammable materials subject to fire safety inspection?
- D. Is there regular elevator inspection by the proper local and state authorities?

Y N A E

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total

8. The workshop, in construction and facilities, should provide for the added safety needs and conveniences of the clients, with special attention to the handicapping features of the various disabilities represented in the workshop.

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- A. Do entrances and exits have the following provisions?
 - (1) Is the entrance at the street level and without steps?
 - (2) Does entrance have easy-operating doors?
 - (3) Is the entrance area kept free from hazards such as ice?
 - (4) Are exits sufficient in number and placed for rapid evacuation in emergency?
 - (5) Are exit doors extra-wide and easy-opening?
 - (6) Is the outside parking area well lighted, hard surfaced, properly marked, and supervised?
- B. Do ramps, corridors, and elevators have the following provisions?
 - (1) Are ramps used in place of stairs wherever possible?
 - (2) Are ramps of sufficient width and of a gradual grade negotiable by wheelchair clients?
 - (3) Are the principal corridors sufficiently wide for two-way wheelchair traffic?
 - (4) Do elevators have doors wide enough to accommodate crutch and wheelchair clients?
 - (5) Are electronically controlled self-operating elevators especially timed?
 - (6) Are elevators sufficient in number, functionally located, and properly guarded?
 - (7) Are sturdy railings, handles, and grab-bars placed on stairs, ramps, washrooms, restrooms, elevators, and other places as needed?

- (8) Are there guards and gates on stairwells, especially for the blind?
- (9) Are travel lanes suitably marked?
- (10) Are offices sufficiently roomy to accommodate wheelchair clients?

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c. Have the following provisions been made for ventilation and noise control?

- (1) Have proper exhaust fans been installed in areas where there is danger from fumes or dust?
- (2) Has air conditioning been installed for its healthful effect, particularly on persons with respiratory problems who need controlled temperature, humidity, and filtered air, and on those with orthopedic or neuromuscular disabilities who exert much energy in movement?
- (3) Have acoustic ceiling tile been used in offices, recreation room, cafeteria, and multi-purpose room to reduce noise?

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d. Do restrooms, toilets, and showers have the following provisions?

- (1) Are restrooms and toilet facilities designed for the various types of handicapped people being served?
- (2) If showers are provided, are automatic heat controls installed to prevent accidental scalding, particularly for the client who has lost the function of heat sensitivity as a result of spinal cord injury?
- (3) Is there ample space and beds for care of clients who are subject to epileptic seizures?

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e. Have the following provisions been made with respect to machinery, equipment, and protective guarding?

- (1) Are moving parts of machinery, power tools, etc., painted distinctive colors, according to commonly accepted color coding?
- (2) Is moving equipment provided with audible and/or visible signal devices?
- (3) Does the electrical wiring system provide panic buttons for instant shut-off of all power operated equipment?
- (4) Does the power equipment have standard guard devices, and added safety devices where the particular disability of the clients exposes them to additional hazards?
- (5) Is daily inspection made to insure the use of all guard devices at all times by all persons in the shop?
- (6) Have hazardous pointed objects been padded?
- (7) Has equipment, especially heights of stools, been adjusted for the safety and comfort of the client?
- (8) Is a safety engineer consulted when changes are anticipated in the work areas?
- (9) Do machines have modern, built-in safety, such as enclosed moving parts, automatic pressure lubrication, push-button controls, electronic devices, and functional use of color?
- (10) Have commercial or custom-built guards been approved by a state factory inspector or an insurance engineer before being installed?

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f. Have the following provisions been made for safety and convenience of clients?

- (1) Are evacuation instructions explained and posted?

- (2) Are there periodic drills for evacuation in case of emergency situations such as fire, storm, and nuclear attack?
- (3) Are evacuation drills timed with a stop watch to determine whether escape routes and methods are satisfactory?
- (4) Are there special arrangements made for evacuating severe cases who cannot use stairs or chutes?
- (5) Are escape routes regularly inspected to ascertain that they are not blocked?
- (6) Are properly equipped first aid kits and facilities in appropriate locations?
- (7) Is there regular plant safety inspection by a qualified person?
- (8) Is safety education evidenced in the following manner: (a) formal safety instruction, (b) distribution of safety literature, (c) use of posters promoting safety, (d) formation of safety committees to report on unsafe conditions or practices, (e) instruction in first aid? (13)
- (9) Does the workshop have a comprehensive fire alarm system?
- (10) Is the warning system and fire apparatus appropriately designed and accessibly placed for the clients served?
- (11) Are there automatic fire doors?
- (12) Are work areas separated by fire walls?
- (13) Is there an adequate and dependable sprinkler system?
- (14) Is the fire alarm in audible and/or visible forms, with vibrator attachment if needed, which can be readily recognized by clients who have visual, auditory, or multiple sensory disability?
- (15) Is protective clothing, glasses, goggles, masks, shoes, etc., provided and used to reduce hazards of injury by fire, chemicals, weights, or other dangerous materials and operations?
- (16) Do floors have a non-slip covering?
- (17) Is non-slip wax used on floors?
- (18) Are the floors free of small, loose mats and coverings with hazardous edges?
- (19) Are there both audible and visible traffic signals in dangerous areas?
- (20) Are telephones easily accessible for summoning help in case of emergency?
- (21) Is one operating staff member assigned the responsibility for shop safety?
- (22) Do all staff members assist with industrial safety programs, fire drills, and inspections?

Y N A E

total

9. The workshop should conform to applicable local, state, and national codes and standards of health, sanitation, lighting, heating, and ventilating, and obtain periodic inspection by appropriate officials.

- A. Does the workshop conform to applicable local, state, and national codes of: (1) health, (2) sanitation, (3) lighting, (4) heating, and (5) ventilating? (14)
- B. Does the workshop obtain periodic inspection by appropriate officials for: (1) health, (2) sanitation, (3) lighting, (4) heating, and (5) ventilating?

Y N A E

total

10. The requirements of the codes covering health, sanitation, and lighting should be supplemented wherever necessary to provide for the special conditions imposed by the various disabilities of the clients.

- A. Is there an adequate and competent staff to maintain the plant?
- B. Does the workshop have a regular cleaning and maintenance schedule?
- C. Are separate restrooms provided for men and women, adjacent to working areas?
- D. Are restrooms equipped for independent use by severely disabled persons?
- E. Are clean-up and wash-up basins, and showers where necessary, adjacent to work areas?
- F. Are there adequate locker facilities to care for clients' clothing and personal belongings during working hours and for storage of shop clothing during non-working hours?
- G. Do the lunchroom facilities meet with the local health and sanitation codes?
- H. Are staff members and clients familiar with the required health practices for the workshop?
- I. Has there been consultation with an industrial engineer regarding air, space, dust, fumes, weights?
- J. Is temporary partitioning of strong framing covered with opaque material such as composition board used, especially for enclosing work areas for disturbed clients?
- K. Are the following essential lighting conditions evident: (1) intensity of light, (2) brightness contrast, (3) artificial illumination?

Y N A E

total

11. The workshop should maintain controlled working conditions and be free from occupational health hazards.

- A. Does the workshop set up and maintain specific control measures indicated by applicable occupational health hazards, including: (1) chemical agents (dusts, fumes, mists, vapors, gases); (2) biological agents (bacteria, fungi, parasites); (3) physical agents and conditions (electromagnetic radiation, noise, extremes of temperature and humidity, abnormal air pressure, and repeated motion, shock, or vibration)?
- B. Is advance and continuing consideration and provision for proper prevention or control given to applicable types of exposures: (1) to toxic substances that may affect the health of clients by inhalation, skin contact, or ingestion; (2) to surroundings which may damage whole body (heat exhaustion, severe burns) or specific organs or members (hearing, sight, limbs, nervous system, muscular system)?

.....

- c. Are appropriate preventive and control measures in use, such as: (1) general ventilation, (2) local exhaust, (3) respiratory protective devices, (4) shielding, (5) protective clothing, equipment, devices, and preparations, (6) isolation or enclosure, (7) housekeeping at the source, and (8) education in personal hygiene and general health, housekeeping and maintenance, and first aid (for cuts, burns, bruises, abrasions, sprains, fractures, shock, etc.)?

Y N A E

.....
total

12. The plant should be maintained, through good industrial house-keeping, to promote safety and prevent accidents by eliminating their causes.

.....

- A. Are materials well stacked, as evidenced by the following characteristics?
- (1) Is the pile cross tied?
 - (2) Is there a safe space between the top of the pile and sprinkler heads or light bulbs?
 - (3) Is the stack free of broken containers?
 - (4) Are containers properly labeled?
 - (5) Is the stack clear of aisle space?

.....

- B. Are materials and equipment returned to their proper storage space after use?

.....

- C. Are spilled oil, water, or other liquids wiped up immediately?

.....

- D. Are oily rags placed in a covered metal container?

.....

- E. Are refuse and waste properly disposed of in receptacles provided?

.....

- F. Is broken glass swept up immediately?

.....

- G. Are nails bent down or removed from lumber or containers that must be handled?

.....

- H. Are empty containers that have held flammable liquids disposed of promptly?

.....

- I. Are tripping hazards such as nuts, nails, pieces of wire, and scrap wood kept picked up?

.....

- J. Are glass containers, full or empty, placed where they are not likely to be knocked down and broken?

.....

- K. Is definite space assigned to each kind and related grouping of materials and articles?

.....

- L. Do the materials and articles most frequently drawn from have preferred accessibility?

.....

- M. Is a system of marking (numbers, letters, words, or symbols) used to identify assigned storage space?

.....

- N. Are markings prominently displayed on the most suitable structural features, such as posts or bins?

.....

- O. Is adequate physical equipment provided as an aid to the ready storage and withdrawal of materials?

.....

P. Are handling aids (such as hand trucks, power trucks, chutes, power lifts, live rolls, endless belts, conveyors, ladders, tables, racks, bins, shelves, and metal containers) kept in a definite and accessible place and in repair?

.....

Q. Are hand tools kept free from grease and rust?

.....

R. Are hand tools always replaced in kits when not in use?

.....

S. Are defective tools, such as striking tools with mushroomed and burred heads, files without handles, and dull saws or chisels, conditioned before they are used?

.....

T. Are work clothes changed without delay if they become soaked with flammable material?

.....

U. Are work clothes washed frequently as a safeguard against skin infections and irritations?

.....

V. Are safety shoes, hats, gloves, face shields, etc., kept in good condition and in a definite place?

.....

W. Does each staff member and client assume his responsibility for maintaining a good quality of industrial housekeeping?

Y N A E

.....
total

13. ***The workshop should use the same criteria as industry in determining the type and amount of labor-saving tools, equipment, and machinery.***

.....

A. Are labor-saving tools, equipment, and machinery provided when their prospective use would seem to be justified on grounds of economy and efficiency?

.....

B. When decisions regarding purchase, construction, and adaptation of tools and equipment need to be made, does the workshop manager consult with an industrial engineer or other qualified persons?

.....

C. Does the administration have a policy with respect to donations of tools and equipment which protects the workshop against obsolescence and overcrowding?

.....

D. Does the workshop manager investigate the possibility of leasing or borrowing from the prime contractor equipment necessary for a job?

.....

E. Does the workshop manager take advantage of opportunities for making purchases of equipment and machinery at: government surplus sales, receivership and bankruptcy sales, industrial plant removal sales, and distress sales?

.....

F. Does the workshop buy, insofar as possible, equipment that: (1) is flexible; (2) is standard; (3) has long life expectancy; (4) has prospective repeat use; (5) can increase job opportunities and shop income?

.....

G. Is adaptation, modification, or adjustment of tools and equipment made when necessary for the comfort and increased productivity of the client?

- | | | | | |
|-------|-------|-------|-------|---|
| ..... | ..... | ..... | ..... | H. Does the workshop manager request that modifications, which are known to be needed, be made by the manufacturer at the time of purchase? |
| ..... | ..... | ..... | ..... | I. Does the workshop make use of jigs where job steps involve the use of potentially dangerous machines or complex assemblies? |
| ..... | ..... | ..... | ..... | J. Are the jigs designed for both accuracy and safety? |
| ..... | ..... | ..... | ..... | K. Are the clamps, braces, and leverage engineered to aid the client to perform tasks and attain tolerance he would otherwise be unable to do? |
| ..... | ..... | ..... | ..... | L. Does the workshop have a planned program of maintenance, providing for: (1) regular inspection, (2) service contracts on machines, (3) staffing for housekeeping, maintenance, and repair? |
| ..... | ..... | ..... | ..... | M. Does the workshop have provision for background music? |
| ..... | ..... | ..... | ..... | N. Does equipment specially designed by the workshop for evaluation and training of the clients exhibit the following qualities: (1) ingenuity, (2) variety, (3) purposefulness, and (4) standardization? |
| | | | | O. Does workshop equipment adequately orient the client for placement in competitive industry? |

E. COMMUNITY RELATIONS

Y N A E

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|-------|-------|-------|-------|--|
| | | | | 1. The workshop should cooperate in defining the needs of handicapped individuals and in community planning to provide services to meet those needs. |
| total | ..... | ..... | ..... | A. Is the workshop an active member of the local health and welfare planning council? |
| ..... | ..... | ..... | ..... | B. Is the workshop influential in a citizens group for community planning for handicapped persons? |
| ..... | ..... | ..... | ..... | C. Has the workshop, under appropriate auspices, such as through a health and welfare planning council having a research staff, undertaken: (1) a community survey of the incidence and types of disability, (2) a community survey of rehabilitation resources, (3) a community survey of employment opportunities? |
| ..... | ..... | ..... | ..... | D. Is the workshop furthering community interest in a study to determine the adequacy of services for the vocationally handicapped? |
| ..... | ..... | ..... | ..... | E. Is the workshop recognized in the community as an agency which is concerned with the total handicapped population? |
| ..... | ..... | ..... | ..... | F. Does the executive director base many of his decisions upon the interests of long-range community planning for services for the handicapped population? |
| ..... | ..... | ..... | ..... | G. Is there a well-informed joint committee, established by the workshop and its referral agencies, to review applications for service? |

.....

H. Does the workshop use the following resources if they are available in the community: (1) difficult case committee, (2) social service exchange, (3) volunteer bureau, (4) cooperative transportation agency to serve workshops, clinics, treatment centers, rehabilitation centers, etc.?

Y N A E

.....
total

2. The workshop should have a continuing program of interpretation to the community through the selective use of publicity media.

.....

A. Does the workshop have a public relations program, or, if it is not feasible to have one as an operating function, does it utilize other public relations resources in the community?

.....

B. Does the responsibility for press relations reside exclusively in the executive director?

.....

C. Has the executive director briefed reporters on the purposes and problems of the workshop?

.....

D. Does the executive director meet reporters regularly?

.....

E. Does the executive director meet reporters on a completely open and frank basis?

.....

F. Is discriminating use made of communications media in the workshop's information program?

.....

G. Are technically competent persons used to prepare and present informational materials for the public?

.....

H. Are presentations in the various media realistic as well as artistic?

.....

I. Does the workshop distribute in printed form a clear statement of its functions and purposes?

.....

J. Is there a printed list and description of services available?

.....

K. Are materials designed for users of workshop services presented with simplicity and appropriateness?

.....

L. Is the public encouraged to visit the workshop to see the facilities and products, the staff and clients at work?

.....

M. Do staff members articulate the concept of the workshop in the informal community groups of which they are members?

.....

N. Does the workshop have exhibits at county and state fairs, rehabilitation or other appropriate conferences?

.....

O. Are annual craft sales a part of the program of interpretation?

.....

P. Do displays of merchandise readily interpret aspects of the workshop program?

.....

Q. Do methods of merchandising contribute to the program of interpretation?

.....

R. Does the receptionist give the same courteous attention to all visitors?

-
- s. Are members of the board of directors sufficiently informed of the employability of workshop clients to represent the workshop in all forms of community activities?
-
- t. Does the workshop maintain records of progress and successful placements for each of its workers, which are used for dramatizing and verifying the capabilities of handicapped workers?
-
- u. Is there a cooperative plan with local management for placement and follow-up of workshop clients?
-
- v. Is there a planned procedure for utilizing the consultative assistance of local labor leaders in determining wage scales for the workshop?
-
- w. Does the workshop maintain close liaison with local labor unions and local organizations representing business and industry as a part of its program of interpretation?
-
- x. Do the clients interpret the workshop accurately and favorably in the community?
-
- y. Is the executive director active in interpreting workshop needs to political action and legislative bodies?
-
- z. Does the workshop have a friendly relationship with the state or other universities which is beneficial to recruitment, research, and program development?
-
- AA. Has the executive director established contact with the local AFL-CIO union counselor and interpreted the services of the workshop to him so that he can serve as an important link between union members with problems and the workshop as one source of help?
-
- BB. Has the executive director worked out a satisfactory procedure for referrals and follow-up by the union counselor?
-
- CC. Has the executive director arranged for the union counselor or other local organized labor representatives to tour the workshop?
-
- DD. Has the executive director invited the union counselor to participate in informal discussions of matters of mutual interest to union members and the workshop?

Y N A E

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total

3. The working relationships of the workshop with referral agencies should ensure prompt initiation of services and continuity of case-work approach.

-
- A. Are there written agreements covering primary interagency relationships?
-
- B. Are there contractual agreements or authorizations for training on file?
-
- C. Do memoranda of understanding include the description and quality of service?
-
- D. Do memoranda of understanding include the bases for computing the charge for the service?

- | | |
|-------|--|
| ..... | E. Is there a definite understanding concerning the amount and method of subsidization? |
| ..... | F. Are definite lines of communication designated between the workshop and each referral agency? |
| ..... | G. Are channels of communication between the workshop and other agencies two-way and open? |
| ..... | H. Is a designated staff member responsible for making interagency contacts for clients and volunteers? |
| ..... | I. Is the designated staff member readily accessible to the proper representative of the referral agency? |
| ..... | J. Is the program and admission policy of the workshop distributed in printed form to all potential referral agencies? |
| ..... | K. Does the workshop provide an orientation program for personnel of referral agencies? |
| ..... | L. Do case records identify the referral agency for each client? |
| ..... | M. Are reports on progress and problems of clients made meaningful to the interested referral agencies? |
| ..... | N. Are there regularly scheduled meetings for liaison persons of cooperating agencies? |
| ..... | O. Is liaison maintained with management and insurance carriers as referral sources? |
| ..... | P. Is there mutual understanding between the workshop and government agencies? |
| ..... | Q. Have cooperative procedures between the workshop and the Selective Placement Branch of the State Employment Service been established? |
| | R. Has a close working relationship been effected with the special education department of the local public school system? |

Y N A E

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|-------------|---|
| | 4. The workshop staff should participate in activities of groups that can contribute to the furtherance of the workshop program. |
| total | A. Do staff members participate in: (1) health and welfare organizations, (2) civic and service groups, (3) professional and technical associations, (4) local and regional planning bodies, (5) national evaluating and accrediting commissions? |
| ..... | B. Is active participation of staff members in various groups encouraged by such methods as payments of dues, reimbursement of expenses, and release of time? |
| ..... | C. Is the executive director available for speeches, panel discussions, and conferences which may further the understanding of the workshop's purposes among service and special interest groups? |

.....

D. Are staff members given assistance in the form of background information, time for preparation, and clerical help in their role of interpreting the workshop program to community organizations?

.....

E. Does participation of staff members in professional and planning groups result in staff development?

.....

F. Do informal contacts and exchange of information with health and welfare groups benefit interagency relationships?

.....

G. Is interpretation of the program of the workshop to the community a definite responsibility of members of the board of directors?

.....

H. Does the workshop give active and vigorous support to responsible promotional agencies such as the President's Committee on Employment of the Physically Handicapped?

Y N A E

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total

5. The workshop should adopt sound, professional fund raising techniques emphasizing the vocational potentials and capabilities of handicapped persons.

.....

A. Does publicity for fund raising focus upon: (1) abilities of handicapped persons, (2) specific jobs in which clients are employed, and (3) services offered by the workshop?

.....

B. Are appeals for funds (1) positive, (2) realistic, and (3) emotionally balanced?

.....

C. Are the needs of the handicapped person and the quality of service the chief bases for seeking community support?

.....

D. Does the workshop demonstrate its responsibility for a public trust by issuing proper financial statements?

.....

E. Is fund raising planned as a part of the annual program of the workshop?

.....

F. Is fund raising geared in amount and timing to budget planning?

.....

G. Is the workshop identified with a particular type of drive and calendar date?

.....

H. Are there different types of appeals for different classes of contributors?

.....

I. Are fund raising methods reviewed annually to reduce administrative costs?

.....

J. Are the workshop's fund raising policies in harmony with those of related community agencies?

Y N A E

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total

6. Fund raising practices should comply with state laws and local ordinances and abide by the ethical practices that civic and social service groups have adopted.

.....

A. Is the executive director acquainted with state laws and local ordinances on fund raising that are applicable to his workshop situation?

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.....

- B. Does the workshop engage only responsible professional fund raisers?
- C. Does the workshop belong to a community fund raising organization which provides proper safeguards and controls and makes equitable distribution of funds among cooperating agencies?
- D. Does the executive director encourage that gifts and bequests to the workshop be unconditional?
- E. Does the workshop use as a guide the principles for fund raising developed by a nationally recognized fund raising or social service organization? (15)

Y N A E

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total

7. The workshop should promptly discharge all its legal, professional, business, and financial responsibilities to other institutions and individuals.

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- A. Are training contracts fulfilled as agreed?
- B. Does the workshop carry comprehensive personal, property, and liability insurance?
- C. Does the executive director respect the professional codes of staff members?
- D. Does the workshop maintain a sound credit rating?
- E. Are production contracts completed on time as agreed?
- F. Are the bases for fee schedules and bidding governed by common practice?
- G. Are financial reports issued regularly?
- H. Are the books audited by a certified public accountant?
- I. Are agency funds protected by a suitable surety bond?
- J. Does the workshop fulfill the requirements of its parent organization or of the workshop affiliation of which it is a constituent?

Y N A E

.....
total

8. The workshop should cooperate on a continuing basis with other workshops in the community in the interests of their common economic problems.

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- A. Does the workshop participate in an area organization of workshops for the exchange of practical information concerning: (1) contract procurement, (2) purchasing, (3) financing, (4) workshop operations, and (5) job opportunities?
- B. Does the workshop borrow, loan, or exchange workers with other workshops to meet commitments, avoid layoffs in slack periods, or obtain persons for jobs with special requirements?
- C. Does the workshop cooperate with other workshops in passing along information regarding opportunities for job placement?

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- (1) Thompson, Nellie Z., Editor. *The Role of the Workshop in Rehabilitation*. Washington: National Rehabilitation Association, 1025 Vermont Avenue, N. W., 1958. (p. 91.)
- (2) Certificate application forms may be obtained from the Wage and Hour and Public Contracts Divisions of the U. S. Department of Labor, Washington 25, D. C., or from the Regional Offices located in: Boston, New York, Chambersburg (Pa.), Birmingham, Cleveland, Chicago, Kansas City (Mo.), Dallas, San Francisco, Nashville, Raleigh, and San Juan (P.R.). Information and advice on application, interpretation, and details of the law may be secured from the foregoing Regional Offices.
- (3) U. S. Department of Labor, Bureau of Labor Standards. *Annual Digest of State and Federal Labor Legislation*, Bulletin 200. Washington: Government Printing Office, 1958.
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 U. S. Department of Labor, Bureau of Labor Standards. *State Workmen's Compensation Laws*, Bulletin 161. Washington: Government Printing Office, August 1957.
 U. S. Department of Labor, Women's Bureau. *State Hour Laws for Women*, Bulletin 250. Washington: Government Printing Office, 1953.
- (4) The following publications of the U. S. Department of Labor, Wage and Hour and Public Contracts Divisions, may be obtained free of charge from the Regional Offices listed in (2):
Acts
 The Fair Labor Standards Act, as amended (and "Handy Reference Guide")
 The Walsh-Healey Public Contracts Act, as amended (and "Handy Guide")
Regulations
 Child Labor Regulation No. 3—Part 4 (subpart c) (Employment of Minors between 14 and 16 Years of Age)
 General Regulations under the Walsh-Healey Public Contracts Act—Part 201
 Records—Part 516: (subpart A—General Requirements; subpart B—Miscellaneous Exemptions and Other Special Requirements)
 Handicapped Workers—Part 524
 Sheltered Workshops—Part 525
 Board, Lodging, or Other Facilities—Part 531
 Executive, Administrative, Professional, Local Retail Employees, and Outside Salesmen—Part 541 (and "Explanatory Bulletin")
 Authorization of Established Basic Rates for Computing Overtime Pay—Part 548 (and "Explanatory Bulletin")
Interpretive Bulletins
 Child Labor—Part 4 (subpart G)
 Wage-Hour Coverage—Part 776 (subpart A)
 Methods of Payment—Part 777
 Overtime Compensation—Part 778
 Retail and Service Establishments—Part 779
 Hours Worked—Part 785
 Written Assurances ("Hot Goods")—Part 789
 Rulings and Interpretations No. 3 under the Walsh-Healey Public Contracts Act
 Safety and Health—Public Contracts Act
- (5) U. S. Treasury Department, Internal Revenue Service. *Tax Guide for Small Business*. (Pub. No. 334) Washington: Government Printing Office, 1959.
- (6) U. S. Department of Health, Education, and Welfare. *Compilation of the Social Security Laws*. (Including the Social Security Act, as Amended, and Related Enactments through December 31, 1956.) Washington: Government Printing Office, 1957.
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TERMINOLOGY

In the context of this Report, the terms below have the following meanings:

accommodation fatigue—

tiring of the eyes due to frequent adaptations of brightness, darkness, or distance.

accounting—

the recording and analysis of all facts which have a bearing on the financial aspects of a business, including external transactions of the workshop with other firms and individuals and the internal operations which are subject to financial record and analysis, for the purpose of giving and interpreting accurate and up-to-date information on what is happening in the business that affects its financial position.

artificial illumination—

adequate artificial lighting to provide suitable complete lighting on task during unfavorable weather conditions, night work, or in work areas without natural light.

autocritical ability—

ability to recognize deviations in performance by self and to correct errors without a high degree of distress by failure or inadequate performance.

auxiliary services—(See supportive services.)

balancing—

walking, standing, or running on narrow or slippery elevated surfaces by maintaining body equilibrium to prevent falling.

bid—

a proposal to furnish on a contract basis, materials, supplies, products, or equipment, or to render services.

brightness contrast—

reflection and diffusion of light from surface to surface and thence to the eye so that there is no uncomfortable glare or contrast between the area upon which the attention is focused and the rest of the visual environment.

carrying—

transporting an object, usually by holding it in the hands and arms.

client—

a handicapped person needing and receiving services in the workshop.

climbing—

ascending or descending ladders, scaffolding, ropes, or stairs, using hands and arms as well as feet.

color vision—

accurate perception of the color of things by sight.

compensatory time—

accumulated overtime or time deficiency which is balanced by adjustment in a subsequent period without affecting wage payment.

competition—

independent activity of two or more buyers or sellers in a specific market.

competitive bidding—

basis of formal advertising, sealed bids, and award to lowest responsible bidder.

competitive employment—

the general commercial labor market, in which employment is on the same terms for handicapped and non-handicapped persons.

component part—

a finished article manufactured for use in subassemblies, end products, or end items.

controlled sampling—

any method of selecting a research sample not dependent on the judgment or convenience of the investigator but based on a statistical technique.

corporation—

an artificial person created by statute law, composed of a collection of individuals united into one body, empowered to transact business like a natural person, and having the advantages of limited liability, continuity of existence, ease of raising money, and organizational prestige.

cost—

an asset value that has been consumed within the workshop, but which, although it has changed form, may still be traced within the workshop.

cost accounting—

the procedures whereby the expenditures relating to production are segregated from other expenditures.

cost-plus-fixed-fee contract—

payment of allowable costs, as defined in the contract, plus a fixed fee based on the original estimated cost and expressed in terms of a definite dollar figure.

counseling—

advising, deliberating, and consulting with client by qualified person.

crawling—

moving about on the hands and knees or hands and feet.

crouching—

bending the body downward and forward by bending the legs and spine.

depreciation—

the decline in value from its original cost of building, machinery, tools, equipment, and fixtures as the result of wear and tear or passage of time.

depth perception—

cognition of relative or absolute distances of objects from each other and from the observer.

deterioration—

a phase of depreciation caused by such actions as weathering, abrasion, concussion, vibration, heavy usage, and/or accidents.

dexterity—

the manual or manipulative ability required to perform work to the degree of accuracy or precision required.

direct cost—

cost that can be easily identified with specific products or processes.

direct labor—

the labor effort expended by employees directly in the manufacture of a product.

direct services—

professional, supervisory, or other services performed by staff members in face-to-face contact with the client or directly affecting a particular client.

disability—

a mental or physical impairment.

distribution—

(See *marketing*.)

distribution costs—

costs incurred other than those related to the production of product or acquisition of goods to be sold, and including the costs of warehousing, effecting sales, getting the goods into the buyer's possession, transportation and delivery, collecting the amounts due, and general and administrative expense.

efficiency engineer—

a technically qualified person who analyzes process methods, procedures, and job characteristics in an industrial plant and modifies them to secure maximum efficiency of equipment and personnel.

employability—

work competency which makes placeability possible.

employee—

any individual who, under the usual common law rules applicable in determining the employer-employee relationship, has the status of an employee.

employer-employee relationship—

the relationship that exists when the person for whom services are performed has the right to control and direct the individual who performs the services, not only as to the result to be accomplished by the work but also as to the details and means by which that result is accomplished.

employment training—

work training on a specific job outside the workshop in which the client has demonstrated readiness for placement.

end item—

a final combination of end products, component parts, and/or material which is ready for its intended use.

end product—

a completed assembly of component parts, sub-assemblies, and/or materials ready for operation, as is, but intended for further installation in an end item.

entry training—

preparation of a client for a semi-skilled production job through actual experience in that particular job under supervision.

environmental factors—

those variables in the workshop surroundings and clients' backgrounds which may affect the client's adjustment to work.

expense—

a cost or asset that has expired in the gaining of revenues; i.e., when the manufactured goods are shipped to the customer, all the costs that went into the production of those goods become expenses.

extended employment—

long-term employment in the workshop that occurs when a client has not yet achieved a work adjustment and rate of productivity adequate for competitive employment or for whom a job opportunity has not yet been found.

fee—

a charge to a referral agency or a client for direct services rendered the client by the workshop.

feeling—

perceiving such attributes of objects as size, shape, temperature, texture, or quality, by means of receptors in the skin, particularly at the finger tips.

fingering—

picking, pinching, or otherwise working with the fingers primarily.

fixed overhead—

items of overhead that remain static irrespective of rate of production.

follow-up—

continued contact with client, and with employer when applicable, over an extended period of time, to determine the effectiveness of the rehabilitation services rendered and of the placement, and to determine the need for further service.

function—

special purpose or province, activity or operation, expected by virtue of the nature of the workshop.

gainful employment—

(See *remunerative employment*.)

general contractor—

(See *prime contractor*.)

habilitation—

(See *rehabilitation*; synonymous except that emphasis is on initial entry.)

handicap—

a barrier to optimal functional level inherent in or imposed by a disability.

handling—

seizing, holding, grasping, turning, or otherwise working with the whole hand or arm.

bearing—

perceiving the pitch, volume, timbre, or other characteristics of sound by the ear.

homebound—

unable for physical, mental, emotional, socioeconomic, or geographic reasons to leave home to travel to and from work.

housekeeping—

the maintenance of plant, materials, equipment, and machines, through good management, to promote safety and prevent accidents by eliminating their causes; through proper planning of layout, space, equipment, and methods, and through training and supervising workers to help keep the workshop in good condition, i.e., neat, tidy, and free from loose, greasy, and dangerous objects on floors, stairways, benches, hallways, aisles, platforms, exits, etc.

human relations—

a field of study and knowledge embracing person-to-person relationships as represented by professions in social service, rehabilitation counseling, psychology, education, etc.

indirect cost—

cost that cannot be easily identified with specific products or processes.

indirect labor—

labor effort expended indirectly in or incidental to the manufacture of a product.

indirect services—

professional, administrative, clerical, or other facilitating services, which in general and indirect ways benefit the individual client.

industrial homework—

a service designed and developed, within the health and labor laws, to offer regular work training and remunerative work opportunities to those eligible disabled persons who are homebound.

informal bid—

a bid in response to personal contact, telephone solicitation, or informal letter.

intensity of light—

sufficient and even distribution of natural light upon working surfaces to enable the work to be carried on with convenience and ease.

intern—

a student assigned for a specific period of time by a college or university as a part of his formal education to work in an agency under supervision for the purposes of integrating classroom learning with practice and developing the art of working with people in his future professional role.

interpretation—

explanation selecting significant information and making it meaningful to a particular person or group.

inventory—

the amount of property on hand at any given time; any itemized list of such property; the act of compiling such a list; the act of inspection to determine the physical existence of property; an asset of a business.

inventory control—

ordering the right materials, economically, and in reasonable quantities; receiving, inspecting, and storing the materials, and accounting for their usage.

inventory turnover—

the number of times that stocks are sold out and replenished during a given period.

invitation to bid—

a request for firm offers on material, equipment, supplies, or services.

jigs—

devices used in job steps involving use of machines or complex assemblies to ensure safety and accuracy in potentially dangerous operations and to permit, by means of scientifically engineered leverage, clamps, and braces, a client with certain limitations to perform tasks that might otherwise require normal capacities and strengths.

job—

a collection of tasks, duties, and responsibilities which, as a whole, is regarded as the regular assignment to an individual employee.

job analysis—

a detailed breakdown of the qualifications and demands involved in carrying out the functions and activities outlined in the job description; the determination of what the worker does, why he does it, how he does it, and the skills involved in the doing.

job classification—

an assignment of jobs in an establishment or industry into a series of categories, each of which is based on progressively higher requirements in terms of skill, experience, training, and similar considerations.

job description—

a listing of all principal functions and activities in a particular position.

job knowledge—

the practical knowledge of equipment, materials, working procedures, techniques, and processes which the worker must possess to handle the job successfully.

job simplification—

the breaking of manufacturing processes and services into smaller or their most minute component steps for purposes of ease of functions, greater accuracy of performance, increased efficiency, closer supervision, utilization of individual capacities, and employment of larger numbers and types of handicapped workers.

job specification—

a written record of job factors, requirements sought in the individual worker for a given job, and other factors which must be considered in the selection of an individual for a specific job, such as hiring policies, legal requirements, and considerations governing the applicant's willingness to accept the job.

job task—

a specific operation in a specified quantity.

job training—

work training in a specific area in which the client has demonstrated proficiency and employment potential.

jumping—

projecting the body up, down, or horizontally through the air, primarily by the muscular action of the feet and legs.

kneeling—

bending the legs at the knees to come to rest on the knees.

labor—

the physical effort of employees who perform manual or physical effort in connection with production or manufacturing operations; and the effort of those who directly supervise work of a physical nature of employees engaged in direct factory operations.

lifting—

raising or lowering an object from one level to another.

maintenance—

systematic upkeep and repair of property, machines, equipment, etc.

manual dexterity—

hand skills.

mark-up—

the percentage beyond standard costs which enable the workshop to operate without loss and to sell its output at a competitive price charged by commercial firms for comparable products or services.

marketing—

the entire process of getting goods and services from the workshop which produces them to the consumer for ultimate consumption; distribution.

material cost factors—

the cost of the raw material that serves as the basis for manufactured, or finished, product.

materials control—

(See *inventory control*.)

merchandising—

the planning involved in marketing the right merchandise or services at the right place, at the right time, in the right quantities, and at the right price.

methods engineering—

analysis to develop the quickest and simplest way of performing necessary operations; standardization to adopt the best operations, equipment, materials, and working conditions possible; measurement to derive the number of "standard" hours in which a reasonably competent, fully trained operator, working at a normal rate of speed, does the job; and incentive compensation to encourage the operators to attain or surpass standard performance.

motion study—

a detailed analysis of the individual body movements of a worker in connection with the performance of a piece of work.

motivation—

determination or desire to work; sustained drive to accomplish and succeed.

non-profit organization—

an organization owned and operated by a corporation or association, no part of the net earnings of which inures, or may lawfully inure, to the benefit of any private shareholder or individual and the income of which is exempt from taxation under Section 501 (a) as defined in Section 501 (c) of the Internal Revenue Code.

not for profit—

(See *non-profit*.)

objective—

aim, goal, or end.

obsolescence—

the loss in part or all of the original value of buildings, machinery, tools, and other capital items as a result of a change in design of a part or being superseded by a new model with more automatic features and higher production capacity.

occupational training—

an organized course of instruction directed toward acquisition of skills necessary to perform a recognized occupation.

on-the-job training—

work training on a particular job in the workshop or outside the workshop in which the client has vocational and placement potential.

open-end contract—

a contract that specifies no quantity.

opening of bids—

formality of public reading of all bids received, on the date and at the time and place specified in the invitation to bid.

overhead—

all expenditures, other than for materials and direct labor, incurred in connection with completion of product and which ordinarily cannot be readily identified directly with any particular unit of production.

packing—

the preparation of an item for shipment or storage; includes required bracing, cushioning, wrapping, strapping, placement in shipping container, and marking.

performance bond—

a bond signed by the contractor and a licensed corporate surety, or two or more individual sureties, to guarantee faithful performance of the contract.

performance evaluation—

a supervisory process characterized by a periodic formal and confidential assessment of a staff member's performance by his immediate supervisor, with the full participation and understanding of the staff member being observed.

personal adjustment training—

the development and conditioning of work habits, work attitudes, work motivation, work tolerance, and social interpersonal relationships required for productive employment.

physical restoration—

medical treatment, corrective surgery, prosthesis, physical and other therapy for the purpose of minimizing a disability or compensating for a sensory loss or loss of body member.

piece rate—

payment related to the quantity of work done as opposed to an hourly rate related to the time spent in doing a job; determined by dividing hourly production quota for each operation into the hourly rate of pay for performing the operation, with due consideration of norms and conditions established by industry, labor unions, or trade associations.

placeability—

ability to secure employment.

prime contract—

the previous and overall agreement with a customer stipulating total responsibility of the prime contractor for fulfillment of an entire project.

prime contractor—

one who ordinarily assumes responsibility for the entire project and who may subcontract portions of the job requiring special skills or equipment; one who supplies materials and renders services under agreement; one who holds a prime contract.

prime cost—

the total of material cost and direct labor.

probation—

the initial employment period of a staff member, during which he is intensively supervised in try-out, orientation, and exposure to practice in an agency program, and which may lead to tenure or separation from the agency.

procurement—

the sum total of all functions identified with the preparation of specifications, invitations to bid, purchase, inspection, warehousing, distribution, transportation, and accounting of services and supplies.

production control—

production completely planned and scheduled in accordance with sales requirements and manufacturing facilities.

production cost—

the total of prime cost and overhead.

production norm—

the number of "standard" hours in which a reasonably competent, fully trained operator, working at a normal rate of speed, does a job.

professional association—

an organization comprised of members of a specific professional discipline, such as social work, psychology, occupational therapy, engineering, or accountancy, which generally requires certification of its membership.

prosthesis—

addition of an artificial part to the human body to compensate for loss and overcome a physical disability which is a vocational handicap.

psycho-sexual development—

distinction of normal sexual roles and concomitant adjustment to normal sexual attitudes and behavior.

psycho-social adjustment—

modification of attitudes and reactions, causative factors for which originate outside the work environment, which preclude successful work adjustment for a client.

pulling—

exerting force upon an object so that the object moves toward the force, including jerking.

pushing—

exerting force upon an object so that the object moves away from the force, including slapping, striking, kicking, and treadle actions.

quality control—

efficient inspection program tailored to each product to ensure meeting specifications; used as an aid to sales and manufacturing.

quota—

an estimate of the amount of work reasonably expected of a client; used as an incentive for remuneration and promotion, and for estimating, business planning, production control, and other aspects of operations.

raw materials—

those industrial goods which in part or in whole become a portion of the physical product.

reaching—

extending the hands and arms in any direction.

readiness—

an overall state of preparedness and disposition for a subsequent step.

referral agencies—

public or private agencies from which the workshop receives clients and to which it sends clients for supportive services or for other rehabilitative services not offered in the workshop program.

rehabilitation—

the comprehensive, integrated, individual approach to the residuals of disability resulting in the client's entry or return, within the bounds of his capacities and limitations, to a useful and satisfying life.

remunerative employment—

work for which the client is compensated at not less than the rates in accordance with the provisions of the applicable federal wage and hour laws.

responsible bidder—

one who qualifies as a manufacturer, contractor, or dealer, who is able to perform under the contract, and who has a record of faithful fulfillment of contract obligations.

running—

moving rapidly by using the feet and legs more quickly than in walking.

sales promotion—

those sales activities that supplement transfer, selling, and advertising and coordinate them to make them effective; includes personal selling, advertising and supplementary selling activities.

sales quota—

an estimate of the amount of a commodity an individual firm expects to sell in a market within a given period of time.

salvage—

property so damaged, worn, deteriorated, incomplete, or specialized that it has no reasonable prospect of sale as a unit or is not usable as a unit without major repairs or alterations.

scrap—

property that has no reasonable prospect of sale except for its basic material content.

selective placement—

placement in which the selection of a job opportunity for the client is based upon the relationship of the physical, mental, and emotional demands of the job to the capacities and limitations of the client.

selling—

the personal or impersonal processes of assisting and/or persuading a prospective customer to buy a commodity or a service or to act favorably upon an idea that has commercial significance to the seller.

services—

activities or anticipated satisfactions which are offered for sale either as such or in connection with the sale of goods.

sheltered—

infers: an environment adapted to client needs for comfort and adjustment; an atmosphere adapted to client's physical and emotional tolerance; a climate of therapy; controlled working conditions and work experiences for evaluation, training, and adjustment purposes; a protected situation to relieve client of competitive pressure and avoid exploitation of his disadvantaged condition.

sheltered workshop—

(See *workshop*.)

simplification—

maximum reduction of variety of commodities consistent with indicated need.

sitting—

resting upon the haunches or lower or posterior extremities of the trunk as in occupying a bench, chair, saddle, etc.

skill—

technical proficiency.

spatial perception—

cognition of size and relationship of space.

specification—

a clear, complete, and accurate statement of the technical requirements descriptive of a material, an item, or a service, and of the procedure to be followed to determine if the requirements are met.

specified intervals—

prescribed periods of time having definite regularity; periodic.

speech—

expression of ideas by means of the spoken word.

spoilage—

the loss of raw materials, component parts, or finished products through unsatisfactory or substandard manufacture, workmanship, handling, packaging, or storage.

staff—

administrative, professional, technical, merchandising, clerical, custodial, and other personnel responsible for the operation of the workshop.

staffing pattern—

the organized arrangement followed in the selection and utilization of staff to effectively carry out the stated program of services of the sheltered workshop.

standard costs—

the theoretic cost of producing an article under a predetermined set of conditions.

standardization—

the determination of basic limits or grades in the form of specifications to which manufactured goods must conform and classes into which the products may be sorted.

standing—

supporting oneself on the feet and legs in an upright or nearly upright position.

stooping—

bending the body downward and forward by bending the spine only.

subcontract—

an agreement under, or subordinate to, a prime contract; a secondary contract.

subcontractor—

a party who contracts with a prime contractor to perform all or any part of a prime contractor's obligations in a particular prime contract.

subsidy—

a fund raised through contributions to the workshop by public and/or private agencies and/or individual philanthropies for the purpose of financing services or activities not self-supporting through production income or fees.

supervision—

responsibility for directing the work of others or for assisting and instructing them in their work.

supportive services—

enabling services which facilitate or strengthen, complement or supplement, the principal services of the workshop toward the comprehensive rehabilitation of the client.

tactile sensation—

(See *feeling*.)

technical association—

an organization comprised of persons having completed specific training or apprenticeship requirements in an art or trade, for example, prosthetists, machinists, foremen, etc.

terminal employment—

permanent employment in the sheltered workshop for those clients who, after a considerable period of workshop services, have not benefited sufficiently to be placed in outside employment, and whose health and security depend on steady work under modified conditions. (See also *extended employment*.)

therapy—

treatment intended to improve or restore a physical or mental function, given under properly qualified direction.

throwing—

propelling an object through space by swinging motion of the hand and arm with or without the use of tongs or other devices.

time rate—

a client's productivity within specified time limits as compared with productivity that could be expected of a non-handicapped person performing the same job in the same amount of time.

time study—

a method of determining the number of units a non-handicapped person of average ability would have to produce to enable him to earn the prevailing hourly rate paid in industry for the same or similar work.

time-study engineer—

a technically qualified person who conducts studies in industrial plants to ascertain the amount of time spent by the workers on the completion of a particular duty and devises methods to improve plant efficiency, or investigates to determine if waste is taking place and submits methods of eliminating such waste.

tolerance—

allowable variance from standards in weight, measure, etc.

trade training—

preparation of client for a trade by an apprenticeship system of a planned program of work under constant supervision.

trainee—

a client during a formal training period in the workshop.

transitional work experience—

a workshop experience in which the handicapped person is preparing to enter into competitive employment, generally taking place in a prescribed period of time.

trial placement—

probationary or conditional placement.

turning—

twisting partly around, or revolving completely about a vertical axis, usually involving the spine, trunk, neck, and legs.

unit—

any fixed amount or quantity adopted as a standard of measurement for other amounts or quantities of the same kind.

variable overhead—

expenditures such as those for indirect labor, supplies, taxes based on payrolls, and workmen's compensation insurance, which vary with operations.

vestibule training—

(See *entry training*.)

vision—

perception of the nature of objects by the eye.

vocational training—

an organized form of instruction which provides the knowledges and skills that are essential for performing the tasks involved in an occupation

volunteer—

a person rendering service in an agency by contributing his time under supervision to areas of the agency program without compensation.

wage subsidies—

payments in excess of actual earnings, ordinarily paid in cash rather than in maintenance or services, to provide a client with sufficient means to meet at least his minimum needs if his earnings fall below that level and to lend a measure of stability to his income by assuring him a guaranteed minimum.

wages—

all remuneration for services performed by an employee for his employer as defined in Section 3401, and further defined in Section 119, of the Internal Revenue Code.

walking—

moving about on the feet by taking alternate steps, setting one foot before the other, without running.

warehouse—

a place in which goods are received, stored, sorted, and issued.

work adjustment—

techniques which utilize and manipulate the work environment to enable the client to develop acceptable work patterns.

work environment—

a situation effectively simulating or duplicating working conditions and atmosphere that would prevail in competitive employment.

work evaluation—

structured use of simulated and real job experiences to provide a broad sampling on a progressive and interrelated basis for purposes of objective observation of the client's capacities and aptitudes to assess productive potentiality in a specific employment field.

work experience—

an opportunity provided for enabling the client to work more speedily and efficiently, to apply or increase job skills, to develop self-reliance and endurance, and to become hardened to the demands of competitive employment.

work flow—

the sequence of the operations or steps involved in the production of an item or in the accomplishment of a particular task.

work measurement—

a technique employed independently or in conjunction with cost accounting for the collection of data on man-hours and production by work units, so that the relationship between work performed and man-hours expended can be calculated and used as the basis for personnel planning, scheduling, production, budget justification, and performance evaluation.

work-oriented objectives—

objectives which emphasize development of employability for placement in the community or provision of extended remunerative employment in the workshop.

work sample—

a miniature job sample that produces all or part of the actual operations required by a job or jobs; used in the construction of an achievement test.

work sample testing—

standardized pattern for observing objectively the performance of the client in a series of typical job tasks under controlled conditions to determine uniformity and comparability of results.

work standard—

the number of man-hours selected to accomplish each work unit for the purpose of appraising an operation.

work tolerance—

capacity to endure or maintain a specified degree of efficiency with concomitant physical and emotional demands of the job; allowable exertion with respect to impaired physical or mental condition.

work unit—

a countable and tangible expression of output or performance which can be identified and adequately described for the purpose of work measurement and/or cost accounting.

worker—

a client during a period of paid work experience or employment.

working conditions—

those environmental conditions over which the worker has no control and which affect his mental or physical well-being.

workshop—

a work-oriented rehabilitation facility with controlled working environment and individualized vocational goals, which utilizes work experience and related services for assisting the handicapped person to progress toward normal living and a productive status. (Note: not in conflict with definition appearing in Section 11 (d) of P. L. 565, 83rd Congress, Vocational Rehabilitation Amendments of 1954, viz., "The term 'workshop' means a place where any manufacture or handiwork is carried on and which is operated for the primary purpose of providing remunerative employment to severely handicapped individuals who cannot be readily absorbed in the competitive labor market.")

PROFILE SHEET

Directions: Transfer from Column Y (Yes) of the checklist your total score for each Standard to the "Total Yes Score" column below. Graph in color or unbroken line your "Total Yes Score". Compare your line graph with the broken line graph plotted on the "Total Number of Items" to readily identify your workshop's areas of weakness in which attention is most needed for improvement.

	Total Number of Items	Total Yes Score	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
A. Program of Services	152																															
1. philosophy and objectives	18																															
2. identification and definition of services	11																															
3. diversity of work experience	20																															
4. coordination of community services	13																															
5. admissions criteria	7																															
6. referral procedures	4																															
7. case records	12																															
8. evaluation and diagnosis	9																															
9. review of client progress	11																															
10. work evaluation and vocational plan	5																															
11. selective placement	15																															
12. follow-up	4																															
13. employment	5																															
14. program evaluation	15																															
15. functional services	3																															
B. Administration	262																															
1. incorporation	22																															
2. non-profit organization	14																															
3. board of directors	18																															
4. policy making	13																															
5. responsibility and authority of director	29																															
6. leadership function of executive director	12																															
7. personnel policies and practices	14																															
8. utilization of community resources	24																															
9. professional progress	17																															
10. business and financing practices	27																															
11. production operations	21																															
12. wage and hour regulations	15																															
13. staff and client benefits	19																															
14. health and safety features of facilities	16																															
15. ethical business practices	1																															
C. Staff	85																															
1. staffing pattern	14																															
2. staff-client ratio	11																															
3. job descriptions and requirements	4																															
4. personnel manual	10																															
5. personnel file	4																															
6. in-service training	20																															
7. volunteers	9																															
8. interns	6																															
9. personnel qualifications	7																															
D. Facilities	128																															
1. location and environment	20																															
2. site	18																															
3. construction	7																															
4. architectural design	6																															
5. provision and arrangement of space	9																															
6. interior decoration	4																															
7. fire and industrial safety	4																															
8. special provisions for safety	6																															
9. health, sanitation, and lighting	2																															
10. supplemental provisions for health	11																															
11. working conditions	3																															
12. industrial housekeeping	23																															
13. labor-saving tools and equipment	15																															
E. Community Relations	92																															
1. community needs	8																															
2. interpretation to community	30																															
3. working relationships with referral agencies	18																															
4. participation in community groups	8																															
5. fund raising techniques	10																															
6. ethical practices in fund raising	5																															
7. discharge of responsibilities	10																															
8. cooperation with other workshops	3																															

